



# Oakland Unified School District

Personnel Management

Comprehensive Review  
September 2003

**Administrative Agent**  
**Larry E. Reider**  
**Office of Kern County**  
**Superintendent of Schools**

Chief Executive Officer  
Thomas E. Henry

# PERSONNEL MANAGEMENT

## Summary of Principal Findings and Recommendations

A FCMAT study team visited the district on three occasions during August 2003 to review the 104 personnel standards that were evaluated and rated for the 2000 comprehensive review. All 104 standards were briefly discussed with more than 28 individuals to determine the current status of completion of the recommendations. Thirty-one of the 104 standards were reviewed in greater depth.

Top-level district administrators have changed several times since the Oakland Unified School District Assessment and Recovery Plan was developed in January 2000. Four individuals have occupied the Superintendent/State Administrator position. Four individuals also have provided leadership to Human Resources, and the Assistant Superintendent for Human Relations position is again vacant.

The people occupying these leadership positions brought their own vision, reorganization, personnel assignments and reassignments to the Human Resources office. Frequent changes in the areas of personnel practices, personnel assignments, and reorganization have all contributed to inconsistent practices being implemented and a lack of continuity of service over time.

Clients of Human Resources services have stated that the many changes have made it difficult to develop effective working relationships within the department and between the department and the district's clients.

The Human Resources Division had 65 full-time equivalent (FTE) positions in January 2000. Since then, the Workers' Compensation Technician and the Compliance Officer have been transferred to other offices. Labor relations analysts have been moved from the service teams to the Labor Relations Unit. The New Teacher Support and Training and Organizational Development units are now a part of Human Resources. After these shifts and district reductions, the Human Resources Division once again has approximately 65 FTE positions.

The Human Resources Division is composed of seven separate, but interrelated units:

1. Recruitment
2. Employment
3. New Teacher Support
4. Service Teams
5. Operations
6. Labor Relations
7. Training and Organizational Development

Communication within each unit appears to be effective, but communication across the seven units within the division is lacking.

## **Status of Human Resources Operations**

The Human Resources Division has made some gains in implementing the January 31, 2000 Assessment and Recovery Plan, however, the FCMAT team has identified some concerns aside from the lack of staff stability.

- Communication between the district office Human Resources staff and the school sites needs to be improved. Poor communication between the district office and school sites manifests itself in a lack of staffing coordination, i.e., being unaware of appropriate staffing assignments and funding sources. Monitoring the process of employee evaluations for classified and certificated staff at all levels continues to be inadequate.
- The Human Resources Division does not provide user friendly services. Information that is provided by staff is sometimes inconsistent, and personnel processes for employees seem overly complex. Many procedural changes made by the various division leaders have made it difficult to develop effective working relationships with the district's clients and school sites.
- The Human Resources Division does not participate in the process of projecting staffing needs. The division appears to have given away significant personnel tasks to other divisions who do not communicate back with the Human Resources Division. As a result, the division does not provide input in long-range planning and decision-making such as projecting student enrollment and projecting staffing needs for the next school year. This also results in a perceived lack of accountability of staff in the Human Resources Division.
- The district needs to focus on more effectively using technology to support personnel operations, especially in implementing a position control system that is integrated with budget and payroll. The BiTech software implementation should be aggressively pursued to achieve a fully integrated position control package. A training plan and budgeted funds need to be provided to train the staff in the use of the new technology software programs.
- The district's budget, payroll, and Human Resources components need to interact more readily to solve the concerns of the users of these services. Regularly scheduled meetings of Human Resources and Payroll staffs should be held to discuss and resolve issues affecting both departments.
- The Human Resources Division lacks written operational procedures and guidelines. A staff team needs to be identified to complete a written compendium of the division's operational procedures to provide consistent direction to division employees.
- A systematic review of job descriptions needs to be undertaken, including the updating of job descriptions. No one in the division appears responsible for this necessary task.
- Cross-training of division staff in the duties of other division staff is needed to ensure that personnel functions are not held up by the absences of specific staff members.

- Written procedures are needed for completing reference checks for potential new hires. The procedures should identify the person responsible to conduct the reference check, specify when it is to be completed, and provide documentation of its completion.

The following personnel areas have improved since the 2000 recovery plan was developed.

- The division is making better use of e-mail for incoming and outgoing communications.
- Better monitoring of teacher credentialing is occurring, and the number of teachers with emergency permits has been reduced.
- Orientation provided to new employees has been improved and new employee orientation handbooks for certificated staff are being provided.
- The division is attempting to improve the monitoring of completion of employee evaluations and is providing evaluation/due process training for management.
- The district has implemented the Peer Assistance and Review (PAR) Program for credentialed teachers.



## 1.5 Organization and Planning

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### Professional Standard

The division has established goals and objectives directly related to the district's goals that are reviewed and updated annually.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The review team was provided a copy of a document entitled "2002-2007 Strategic Alignment Plan – Personnel Committee." It contained a district mission statement, "Our Long Term Goals," and the following four areas of human resources administration:
  - 1) Investing in People
    - Needs-assessment-driven training program for classified staff
    - Rigorous monitoring and support for teachers on the credentialing continuum
    - Support for the implementation of the PAR program
  - 2) Supporting Excellence in Teaching and Learning
    - Teacher recruitment strategy that deploys principals and teachers as ambassadors
    - Retention efforts focused on improving teaching conditions along with financial incentives for teachers
    - Substitute pool to support professional development for teachers
  - 3) Building Community and Strong Relationships
    - Trust and public commitment
    - Develop a more proactive approach to the contract negotiation process
    - Create a workforce that reflects and can communicate with the community
  - 4) Developing Excellence in Operations and Services
    - Redesign and integration of human resources information systems and business processes in anticipation of the implementation of BITECH.
    - HR customer service standards with appropriate support and training
    - Metrics to collect data on support and services
2. The review team was also provided a one-page document entitled "Human Resources Objectives 2003-2004" that listed four areas for attention:
  - A qualified teacher in every classroom
  - Rigorous monitoring and support for teachers on the credentialing continuum
  - Implementation of BITECH Human Resources module
  - Classified training program
3. It was reported that, during the past year, individual human resources staff members were not required to submit annual goals and objectives. Additionally, individuals did not have to submit personal professional development plans.

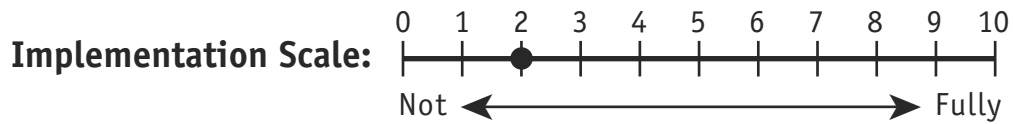
## Recommendations to Address

1. Ensure individual staff members prepare annual goals and objectives. These annual goals should center around staff members' responsibilities and personal professional development plans and should be part of the employee's evaluation. Written goals should be developed annually by August 15.

### Standard Implemented: Partially

January 2000 Rating: 2

September 2003 Rating: 2



## 2.2 Communications: Internal/External

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### Professional Standard

The Human Resources and Business Divisions have developed and distributed a menu of services that includes the activities performed, the individual responsible, and the telephone numbers where they may be contacted.

### Progress on Implementing the Recommendations of the Improvement Plan

1. A draft of a “Directory of Services” for the Human Resources Division was recently prepared and is in a working draft status. It contains:
  - Services provided in alphabetical order
  - A contact person in Human Resources Division
  - Telephone extension for the contact person
  - An e-mail address for contact person

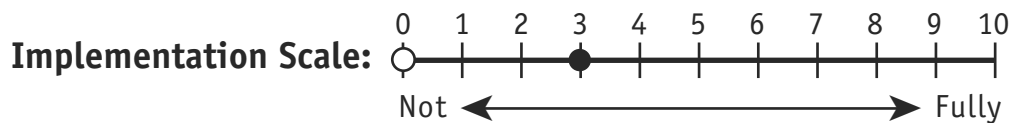
The directory covers appropriate personnel, payroll and benefit activities.

### Recommendations to Address

1. Complete the directory and distribute it to all appropriate users of Human Resources services as soon as possible.

### Standard Implemented: Partially

January 2000 Rating: 0  
September 2003 Rating: 3





## 2.3 Communications

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### Professional Standard

The Human Resources Division provides an annual report of activities and services provided during the year.

### Progress on Implementing the Recommendations of the Improvement Plan

1. There has been no progress in this area. Annual reports of personnel activities and services are not provided.

### Recommendations to Address

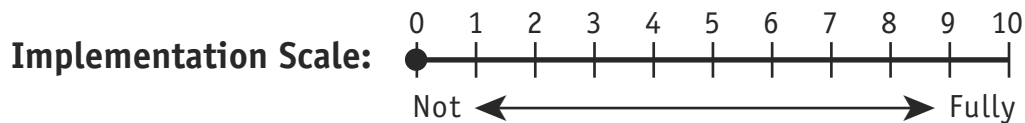
Continue the previous recommendations:

1. Develop a comprehensive annual report that describes Human Resources Division services, functions and accomplishments for internal and external customers.
  - Assign staff members to complete the report.
  - Record monthly activities and services of the Human Resources Division and review them at staff meetings. When technology is updated and training on the use of effective software programs is provided to staff members, activities and services should be maintained on a computer database.

### Standard Implemented: Not Implemented

January 2000 Rating: 0

September 2003 Rating: 0



## 2.4 Communications: Internal/External

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### Professional Standard

The Human Resources Division staff is cross trained to respond to client need without delay.

### Progress on Implementing the Recommendations of the Improvement Plan

1. Cross training is often provided for the staff within the separate units of the Human Resources offices, e.g., within service teams, within the operations area and within labor relations. There is still a need for cross-training across the division.

### Recommendations to Address

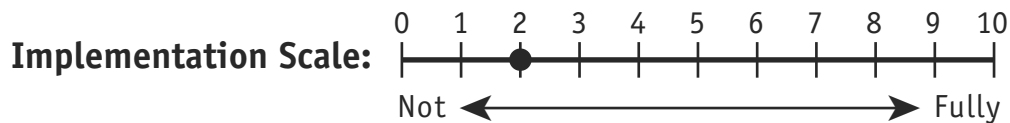
Continue the previous recommendations:

1. Develop a plan for cross training employees that provides an overall view of the division and all employees' responsibilities as they related to the division as a whole.
  - Provide cross training for Human Resources Division employees within the context of the entire division.
  - Use group training sessions and staff meetings as one method of cross training.
  - Encourage employees to substitute for each other for planned absences as a method of cross training.

### Standard Implemented: Partially

January 2000 Rating: 2

September 2003 Rating: 2



### 3.3 Certificated Recruitment and Selection

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#### Professional Standard

The job application form requests information that is legal, useful, pertinent, and easily understood.

#### Progress on Implementing the Recommendations of the Improvement Plan

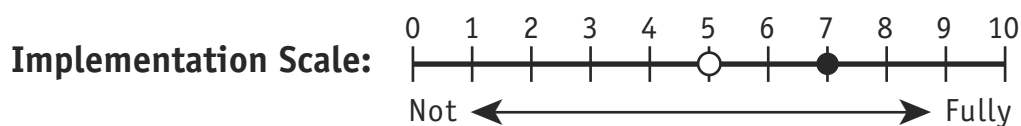
1. The certificated application packet has been revised and updated.
2. Applicants may apply online and receive all the required information regarding the process for employment in the district. The application forms also meet the specific needs for adult education and early childhood applicants.
3. The certificated application packet does not provide a flow chart diagramming the employment process as available online. The classified application is being updated and is being made available online.
4. The Voluntary Equal Employment Data Form that is provided to all applicants is appropriate, easy to use and self-explanatory.\

#### Recommendations to Address

1. Continue to streamline and revise the application packet so that it is informative, relevant, user-friendly, and complies with both state and federal laws.

#### Standard Implemented: Partially

January 2000 Rating: 5  
September 2003 Rating: 7



## 3.7 Certificated Recruitment and Selection

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### Professional Standard

A summary or evaluation of the results of the year's recruitment efforts is provided in written form.

### Progress on Implementing the Recommendations of the Improvement Plan

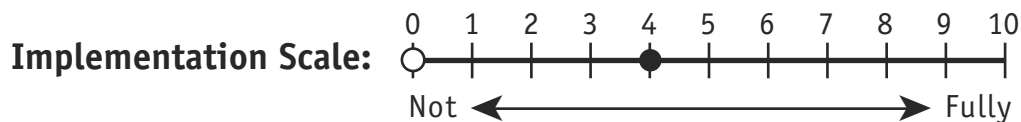
1. On March 14, 2001, a Strategic Plan for Recruiting and Retaining Qualified Teachers was presented to the Governing Board. The plan identifies all recruitment efforts, including colleges, programs, job fairs, and conferences. It also provides incentives for retention of qualified teachers, as well as anticipated attrition.
2. Information has been available for the development of a recruitment summary of the results of efforts for 2002-2003. No summary has been presented to the board or cabinet this year.

### Recommendations to Address

1. Provide an annual written report of the results of recruitment efforts to the cabinet, Governing Board and other interested parties.

### Standard Implemented: Partially

January 2000 Rating: 0  
September 2003 Rating: 4



## 3.9 Certificated Recruitment and Selection

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### Professional Standard

The district systematically initiates and follows up on experience and reference checks on all applicants being considered for employment.

### Progress on Implementing the Recommendations of the Improvement Plan

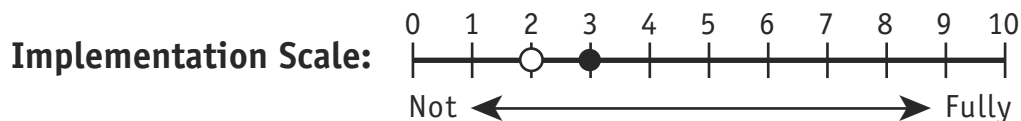
1. No written procedure has been developed for completion of reference checks, nor has there been a Human Resources staff person (administrator) assigned to ensure that reference checks are completed. Principals are not responsible for reference checks.
2. A reference check form is used by the Human Resources Analyst (who is also responsible for recruitment activities), who makes some reference check calls for applicants receiving contingent offers of employment.
3. Reference checks should be completed prior to offers of employment. Forms should be retained in the Human Resources Division.

### Recommendations to Address

1. Develop a written procedure delineating the scope and specific steps to be taken while conducting a reference check and denote the positions responsible for these steps.
  - Develop a standard reference checking form showing who was contacted, the date, telephone number, and a summary of the reference received.
  - Assign and train more staff members to perform reference checks for potential teacher candidates.
  - Complete reference checks prior to offers of employment. Forms should be retained in the Human Resources Division.
  - Expand inquiries on the application form to include questions on past performance on the job, e.g., “Have you received an unsatisfactory or less-than-satisfactory performance evaluation as a teacher?”

### Standard Implemented: Partially

January 2000 Rating: 2  
September 2003 Rating: 3



### 3.10 Certificated Recruitment and Selection

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#### Professional Standard

The district appropriately monitors teacher assignments and reports as required under Education Code 44258.9.

#### Progress on Implementing the Recommendations of the Improvement Plan

1. The new Manager of Credentials has met with service teams weekly and provided credentials training. Training is ongoing.
2. The California Commission on Teacher Credentialing (CCTC) Manual/Credentials Reference Book has been issued to site administrators with appropriate instructions.
3. Assistance from the Alameda County Office of Education is available and used as needed.
4. Certification compliance is excellent with most new hires fully and appropriately credentialed and only one preintern teacher employed at the time of the review. Many openings had yet to be filled. It is anticipated that most new hires will be fully credentialed.
5. Orientation for credential and permit renewals is provided as required. Six speech therapists from the Philippines are currently on waivers.

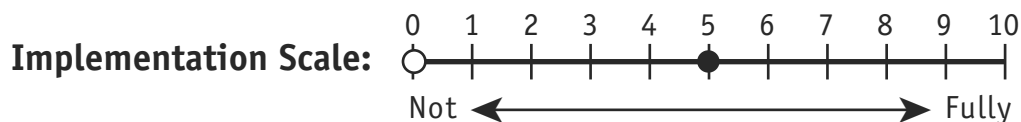
#### Recommendations to Address

1. Continue providing ongoing credential training for both Human Resources site and program administrators.

#### Standard Implemented: Partially

January 2000 Rating: 0

September 2003 Rating: 5



## 4.3 Classified Recruitment and Selection

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### Professional Standard

The job applicant form requests information that is legal, useful, pertinent, and easily understood.

### Progress on Implementing the Recommendations of the Improvement Plan

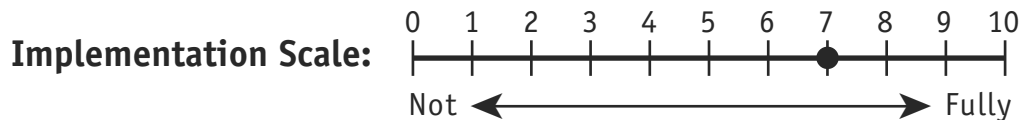
1. The Human Resources Classified Application has not changed since April 1999 and needs to be revised.

### Recommendations to Address

1. Revise the classified application form:
  - Include a reasonable accommodation statement on the form.
  - Consider including additional statements on the form regarding probationary term and other issues that would be beneficial to the district in the event of progressive discipline or termination.
  - Redesign the application form to provide adequate space for information and answers to questions.
  - Add space for the applicant to provide his/her e-mail address.

### Standard Implemented: Partially

January 2000 Rating: 7  
September 2003 Rating: 7



## 4.4 Classified Recruitment and Selection

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### Professional Standard

The recruitment plan identifies various recruitment sources utilized in the search process for the numerous position classifications.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The Human Resources Division has procedures to ensure classified vacancies are posted on the district's Web site and on its 24-hour job line.

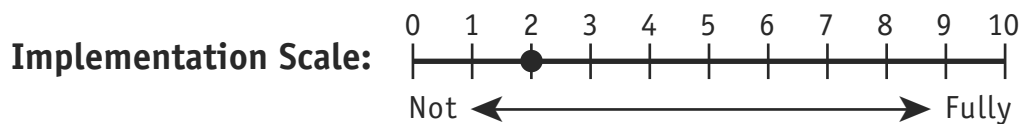
### Recommendations to Address

1. Continue to work on a classified recruitment plan that includes:
  - Developing and publishing a formal recruitment plan for classified staff.
  - Contacting other districts to discuss effective methods for recruiting classified staff

### Standard Implemented: Partially

January 2000 Rating: 2

September 2003 Rating: 2





## 4.7 Classified Recruitment and Selection

### Professional Standard

A summary of the recruitment efforts for the year is provided in written form.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The Human Resources Division does not currently provide a written report describing its classified employee recruitment efforts.

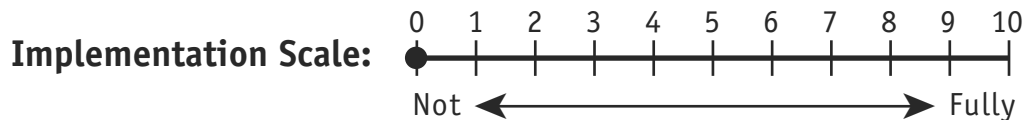
### Recommendations to Address

1. Examine the data currently collected as part of the application process and the data available from the HRS (BITECH) system to develop an annual report that summarizes its classified employee turnover and recruitment activities.

### Standard Implemented: Not Implemented

January 2000 Rating: 0

September 2003 Rating: 0



## 5.2 Employee Orientation

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### Professional Standard

The Human Resources Division provides orientation handbooks for new employee orientation in all classifications: substitutes, teachers and classified employees.

### Progress on Implementing the Recommendations of the Improvement Plan

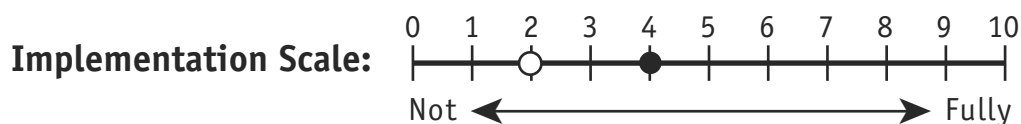
1. The Human Resources Division provided the review team with a New Teacher Handbook 2002-2003. It was distributed to all new teachers by the new teacher support and development staff of Human Resources.
2. The district does not provide new classified employees with an orientation handbook. Most of the orientation that new classified employees receive is provided by the Human Resources staff during induction (processing of required paperwork) and by the employees' supervisors.
3. During past years, certificated and classified substitutes have received various materials related to their roles as substitutes. The review team received a draft copy of a new substitute handbook that was for both certificated and classified substitute employees.
4. New teachers in the 2001-2002 school year received a document entitled Evaluation Handbook for Classroom Teachers, Special Education Teachers, Psychologists, Counselors and Nurses. This handbook was not provided this year to new teachers because of lack of resources.

### Recommendations to Address

1. Develop and distribute a classified employee's handbook to all new classified employees.
2. Continue to provide certificated handbooks to new certificated personnel. Complete the draft of the certificated/classified substitute handbook and distribute it to substitute employees.

### Standard Implemented: Partially

January 2000 Rating: 2  
September 2003 Rating: 4



## 6.3 Operational Procedures

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### Professional Standard

The Human Resources Division has an operation procedures manual for internal department use in order to establish consistent application of personnel actions.

### Progress on Implementing the Recommendations of the Improvement Plan

1. There is no procedures manual for internal department use.

### Recommendations to Address

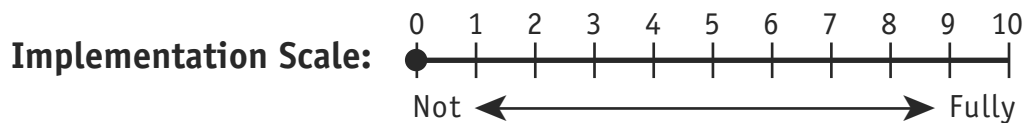
Continue the previous recommendations:

1. Designate a manager to develop and maintain an operational procedures manual for internal use by Human Resources Division employees and external use by managers and supervisors.
2. Develop procedures for consistent application of personnel actions that are legal and sound.
3. Identify reports and documents with time lines to ensure compliance with legal and contractual directives.

### Standard Implemented: Not Implemented

January 2000 Rating: 0

September 2003 Rating: 0



## 6.11 Operational Procedures

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### Professional Standard

Established staffing formulas dictate the assignment of personnel to the various sites and programs.

### Progress on Implementing the Recommendations of the Improvement Plan

1. Human Resources staff members have been trained in staffing formulas and their utilization to process personnel actions. Some new employees need further training.
2. A written procedure has been developed that authorizes an override of the position control system so that the person making the request will be held accountable for the additional budget required to increase staffing. There is a “green sheet” process for this action.
3. It was reported that any request for increased for staffing must receive written approval in the following order: Executive Director, Fiscal Crisis and Management Assistance Team, Superintendent, and Human Resources.

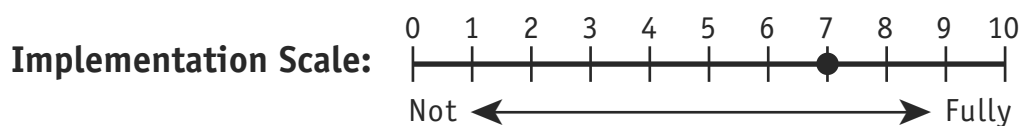
### Recommendations to Address

1. Develop comprehensive written procedures for making staff assignments in compliance with formulas and budget allocations. The written procedures must be issued to all those involved in the process.

### Standard Implemented: Partially

January 2000 Rating: 7

September 2003 Rating: 7



## 7.12 State and Federal Compliance

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### Professional Standard

The district is in compliance with the Family and Medical Leave Act (FMLA), including posting the proper notifications.

### Progress on Implementing the Recommendations of the Improvement Plan

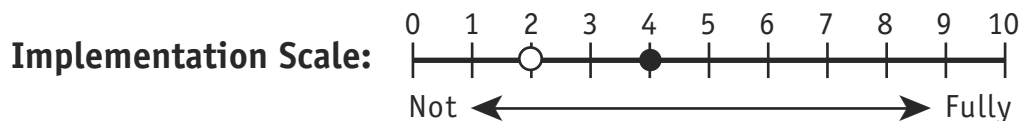
1. The district has obtained appropriate laminated posters covering the Family and Medical Leave Act (FMLA). These are posted in prominent places that can be viewed by all employees and the public.
2. There is evidence procedures have been drafted regarding the FMLA. However, these have not been implemented. The Human Resources Division participated in a workshop covering the FMLA that was put on by outside legal counsel on February 28, 2000. Managers in the division attended the training.
3. Human resources analysts handle all FMLA matters, including counseling employees at the work site on their rights under the act. FMLA leaves are coordinated with other leaves, where appropriate.
4. Reference to the FMLA appears in the New Teacher Handbook.
5. The new data system (BITECH) will be used to track leaves and ensure consistency across the district.

### Recommendations to Address

1. Complete the development of procedures regarding the FMLA and distribute them as appropriate.
2. Monitor the new data system (BITECH) to ensure it can be used effectively to track leaves of absence.

### Standard Implemented: Partially

January 2000 Rating: 2  
September 2003 Rating: 4



## 8.1 Use of Technology

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### Professional Standard

An online position control system is utilized and is integrated with the payroll/ financial systems.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The district has not yet implemented its new BITECH software for Human Resources and Payroll. Position control is currently monitored by both Human Resources, using its own software, and by Finance, using its own software. The two systems need to be manually reconciled.

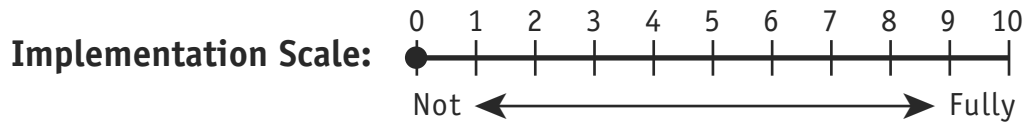
### Recommendations to Address

1. Aggressively pursue the full implementation of BITECH software for Human Resources and Payroll to achieve a fully integrated position control package that can be used by both Budget and Human Resources.

### Standard Implemented: Partially

January 2000 Rating: 0

September 2003 Rating: 0



## 8.2 Use of Technology

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### Professional Standard

The Human Resources Division provides an automated substitute calling system. The system should have the ability to input and retrieve data. Data should be distributed to site and program managers.

### Progress on Implementing the Recommendations of the Improvement Plan

1. Human Resources has provided four weeks of training to its staff on the use of the Substitute Employee Management System (SEMS). In addition, the Human Resources staff has made a number of telephone contacts with other districts to discuss SEMS issues.
2. A new handbook is being developed for substitutes that includes information on the use of SEMS. New software also has been recently purchased to upgrade SEMS capabilities that, when fully implemented, will allow principals to enter substitute requests online and to generate teacher absentee reports.

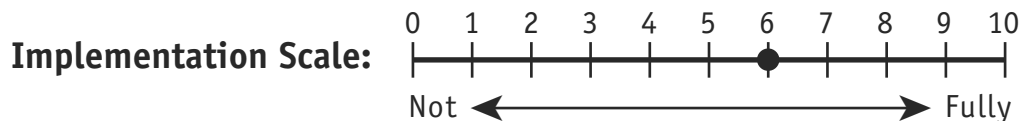
### Recommendations to Address

1. Continue to pursue full implementation of the SEMS software that will allow principals to enter substitute requests online and to generate teacher absenteeism reports.
2. Explore the feasibility of tying the SEMS system with the BITECH system once the district fully implements BITECH. At the present time, there is no plan to integrate SEMS with the district's Payroll system.

### Standard Implemented: Partially

January 2000 Rating: 6

September 2003 Rating: 6



## 8.4 Use of Technology

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### Professional Standard

The Human Resources Division has in place a program of providing funds and time for staff training and skills development in the use of computers.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The Human Resources Division lacks a formalized program for assessing staff's skill level and needs in the area of computer use. A number of existing staff members are proficient in the use of many software programs and serve as "trainers" for others who are less proficient.

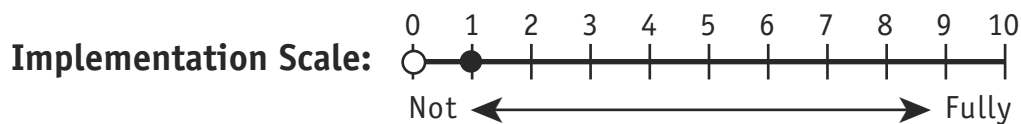
### Recommendations to Address

1. Enhance the overall quality of staff proficiency by taking the following steps:
  - Develop a plan for the use of technology in the Human Resources Division, that includes a budget, to provide staff training in the use of computer hardware and software.
  - Provide training in word processing, spreadsheets, e-mail, BITECH, and other areas.
  - Provide options for more advanced training in these and other software programs at local colleges and through private companies.

### Standard Implemented: Partially

January 2000 Rating: 0

September 2003 Rating: 1





## 9.5 Staff Training

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### Professional Standard

The district provides training for all management and supervisory staff responsible for employee evaluations.

### Progress on Implementing the Recommendations of the Improvement Plan

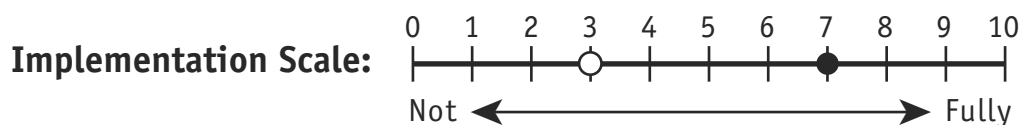
1. Certificated evaluation and discipline training was provided to administrators and supervisors responsible for certificated evaluations. In January 2002, the law firm of Rutz and Sparrow provided training that included a binder of materials for each participant.
2. During the 2002-2003 school year, three additional workshops were provided to the evaluators. Binder materials were updated to address any changes in law or the collective bargaining agreement.
3. Classified evaluation and discipline training was provided in February 2002, followed by two additional workshops during the 2002-2003 school year.
4. The Law Firm of Breon, Shaeffer and Bryant provided training for Human Resources management. The published reference handbook, "Administrators Guide for Classified Evaluations and Discipline for 2002-2003," was issued to participants.
5. Evaluation has been a priority of the district for the past three years.

### Recommendations to Address

1. Continue to provide training to managers and supervisors in the area of evaluation and due process.
2. Continue focusing on employee evaluation as a district priority.

### Standard Implemented: Partially

January 2000 Rating: 3  
September 2003 Rating: 7



## **10.1 Evaluation/Due Process Assistance**

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### **Professional Standard**

The Human Resources Division provides a process for the monitoring of employee evaluations and the accountability reporting of their completion.

### **Progress on Implementing the Recommendations of the Improvement Plan**

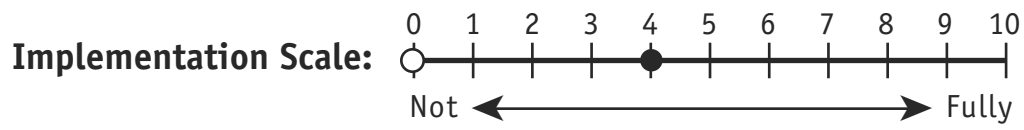
1. The Human Resources Service Teams Unit provides a site-by-site computer-generated data sheet listing each employee's last recorded date of evaluation. Copies are distributed to Human Resources, the site administrators, the administrators' immediate supervisors, who are called area executive directors.
2. Copies of certificated evaluations are completed by the site administrator and sent to both Human Resources and the area executive directors. Service team technicians enter the dates of completion into the databank system.
3. Updated data runs can be received upon request. The executive directors are responsible for monitoring certificated evaluations. Classified evaluations are forwarded to the executive directors upon request.
4. There is no formal process for monitoring classified evaluations or for following up on those who were not evaluated.
5. A document titled "Implementation of Evaluation Calendar" was provided to the review team. This document was two years old, but the team was informed that it was a sample of what was provided to administrators to evaluate certificated employees. All permanent classified employees are to be evaluated by May 1st each year.
6. The district's Administrative Employee Summary Appraisal Form includes a section for evaluating and rating the administration's staff performance evaluations. This is included under the subheading "Personnel and Professional Growth Management." The item specifically states: "Follows district directives and contractual guidelines for appraising all personnel."

### **Recommendations to Address**

1. Hold the Human Resources Division head accountable for monitoring all evaluations and sharing results with cabinet.
2. Ensure managers' and supervisors' evaluations reflect how well they have completed all required evaluations for employees under their supervision.
3. Assign the Human Resources Division to continue providing administrators with listings of employees to be evaluated and a calendar of the evaluation time lines.

## Standard Implemented: Partially

January 2000 Rating: 0  
September 2003 Rating: 4



## 10.3 Evaluation/Due Process Assistance

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### Legal Standard

A clear policy and practice exists for the written evaluation and assessment of certificated employees. Education Code § 44663

### Progress on Implementing the Recommendations of the Improvement Plan

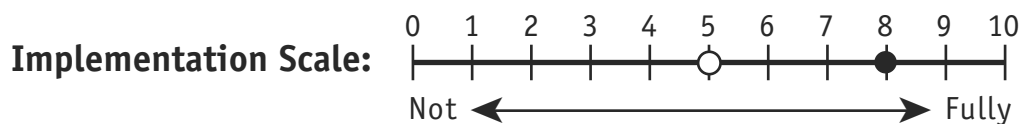
1. The collective bargaining agreements for certificated employees of the district provide language on the evaluation process.
2. Previous review team recommendations emphasized the need for evaluation training and for providing documentation in the form of a handbook for certificated administrators.
3. The law firm of Rutz and Sparrow provided a workshop in January 2002 on certificated evaluation and discipline. This workshop and the three others that followed during the 2002-2003 school year provided the participants with reference binders to take with them upon completion of the training.

### Recommendations to Address

1. Continue providing training to certificated administrators covering the assessment of certificated employees.
2. Provide an updated certificated evaluation handbook as part of the training.

### Standard Implemented: Fully – Substantially

January 2000 Rating: 5  
September 2003 Rating: 8



## 10.5 Evaluation/Due Process Assistance

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### Professional Standard

The Human Resources Division has developed an evaluation handbook for management and supervisory training.

### Progress on Implementing the Recommendations of the Improvement Plan

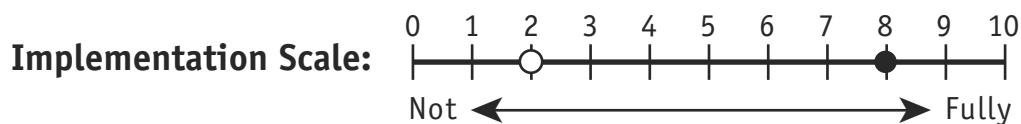
1. In January 2002, the law firm of Rutz and Sparrow provided a comprehensive formal program on certificated evaluation and discipline. The materials for the in-service training were provided in a binder that each administrator retained for his/her personal use. During the 2002-2003 school year, a similar workshop was provided three times for all administrators supervising certificated personnel. Each time the workshop was offered, the contents of the new binder were updated to address any changes in the law or the collective bargaining agreement.
2. The same law firm provided similar training for the classified evaluation and discipline of employees. Binders were again provided. The first workshop was held in February 2002, followed by two additional workshops during the 2002-2003 school year.
3. The law firm of Breon, Shaeffer and Bryant provided a training program for Human Resources management. The published reference handbook was entitled, "Administrators' Guide for Classified Evaluations and Discipline for 2002-2003."

### Recommendations to Address

1. Continue to provide training for management and supervisory personnel on the evaluation of employees. Utilize an updated handbook distributed to managers and supervisors as part of the training.

### Standard Implemented: Fully - Substantially

January 2000 Rating: 2  
September 2003 Rating: 8



## 10.8 Evaluation/Due Process Assistance

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### Professional Standard

The district has developed a plan to address a Peer Assistance and Review Program (PAR).  
Education Codes 44498, 44500-44508, 44662, and 44664.

### Progress on Implementing the Recommendations of the Improvement Plan

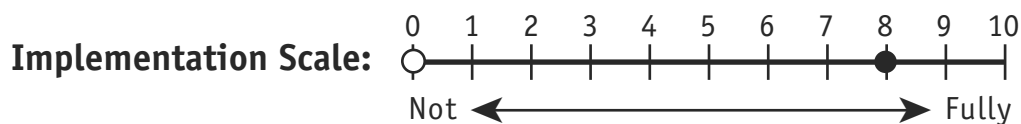
1. The teachers' association and the district negotiated Article 27.0 – Peer Assistance and Review -- that was placed in the July 1, 1999 to June 30, 2002, collective bargaining agreement. This agreed-upon article was effective July 1, 2000, using 1999-2000 as a planning year. Subsections included in the article include:
  - Definitions
  - Joint Committee
  - Responsibilities
  - Annual Budget
  - Confidentiality
  - Participating Teachers
  - Referral
  - Consulting Teachers
  - Peer Assistance and Review Process for Permanent Teachers
  - Participating Teacher Due Process Rights
2. Six permanent teachers were referred to the program for the 2002-2003 school year for having unsatisfactory performance. To be referred to the program, a teacher must have unsatisfactory evaluations in two or more of the five teaching standards.

### Recommendations to Address

1. Utilize the PAR program for the remediation of unsatisfactory teacher performances.

### Standard Implemented: Fully - Substantially

January 2000 Rating: 0  
September 2003 Rating: 8



## 11.2 Employee Services

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### Professional Standard

The Human Resources Division has developed recognition programs for all employee groups.

### Progress on Implementing the Recommendations of the Improvement Plan

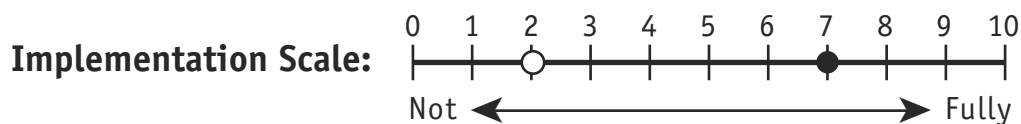
1. The Public Information Office has had responsibility for providing information on retirement activities. Retirees were honored at a retirement reception held June 5, 2002, at the Mills College Education Complex. Retirees received distinguished service awards for their years of service.
2. The district recognizes its teachers receiving National Board Certification. Employees are recognized for outstanding service to the district, students and/or community with a resolution issued by the Advisory Board of Education. This recognition may be in the form of a tribute or memorial tribute.
3. The district has had an employee of the month recognition program. Each department head may submit names for nomination. Distinguished service awards are presented. The district has a video of the 2001 employee retirement that was shown on KDOL-TV, Channel 13.

### Recommendations to Address

1. Assign the Human Resources Division leadership to work closely with the Public Information Office in providing recognition events.

### Standard Implemented: Partially

January 2000 Rating: 2  
September 2003 Rating: 7



## 12.2 Employer/Employee Relations

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### Professional Standard

The Human Resources Division involves site-level administrators in the bargaining and labor relations decision-making process.

### Progress on Implementing the Recommendations of the Improvement Plan

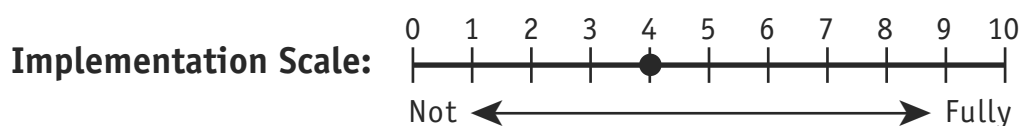
1. The district has started to include site-level administrators on its negotiating team with the Oakland Education Association.
2. The district lacks a formal written process to annually solicit comments from district administrators prior to negotiations with each bargaining unit. E-mail and administrative meetings are sometimes used for this purpose; however, all administrators are not necessarily included in this process.
3. The Human Resources Division collects and compiles detailed information from all grievances that can be used to develop management proposals in those contract areas that need to be addressed. The information can allow site-level administrators to review and comment on these problem areas.
4. During the course of negotiations, there is no systematic communications system for updating site-level administrators on the status of negotiations. Some administrators obtain information from management bargaining team members, while others obtain it through administrative meetings. Some administrators may receive no information.

### Recommendations to Address

1. Develop a plan to include site-level administrators on district negotiating teams with additional bargaining units. Include them in future negotiations.
2. Develop an annual written survey that allows site-level administrators to provide comment and opinion prior to negotiations with each bargaining unit.
3. Develop a uniform system of communication to update site-level administrators on the status of negotiations.

### Standard Implemented: Partially

January 2000 Rating: 4  
September 2003 Rating: 4





## 12.5 Employer/Employee Relations

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### Professional Standard

The Human Resources Division has a process in place that provides management and the Governing Board with information on the impact of bargaining proposals (e.g., fiscal, staffing, management flexibility, and student outcomes).

### Progress on Implementing the Recommendations of the Improvement Plan

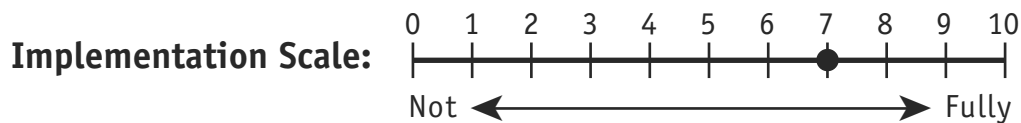
1. The Human Resources Division and the Business Division have been working together to ensure representation from the Business Division on each of the district negotiating teams. This is intended to ensure that accurate financial information is available to management during the course of negotiations.
2. The Business Division has indicated it is responsible for preparing and filing all appropriate Assembly Bill 1200 reports with the Alameda County Office of Education.
3. The district includes cabinet-level administrators on certain district negotiating teams.

### Recommendations to Address

1. Continue to refine the process of providing information to management regarding the status of collective bargaining.

### Standard Implemented: Partially

January 2000 Rating: 7  
September 2003 Rating: 7



## 13.2 Employee Benefits/Workers' Compensation

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### Professional Standard

Employee benefits are well understood by employees through periodic printed communications provided by the Human Resources Division.

### Progress on Implementing the Recommendations of the Improvement Plan

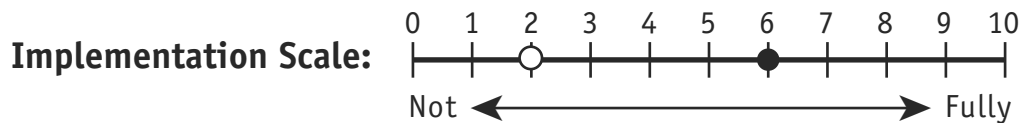
1. Human Resources has developed a number of vehicles for communicating with employees on their benefits, including:
  - a) A district Web page describes the district's plans, eligibility requirements, enrollment time lines and forms. The Web site also has open enrollment information, including dates and location of health fairs for 2003. Employees can view benefit plan descriptions.
  - b) A benefit plan matrix for each bargaining unit comparing the benefits and costs of each carrier.
  - c) Periodic flyers describing upcoming changes in benefit plans.
  - d) Revised benefit election forms that are clear and easily completed.

### Recommendations to Address

1. Continue to examine means in which employee benefits information can be shared with all employees.

### Standard Implemented: Partially

January 2000 Rating: 2  
September 2003 Rating: 6



## **13.4 Employee Benefits/Workers' Compensation**

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### **Professional Standard**

Employees are provided immediate notification that premiums due under COBRA were not received timely and coverage stopped as of date specified.

### **Progress on Implementing the Recommendations of the Improvement Plan**

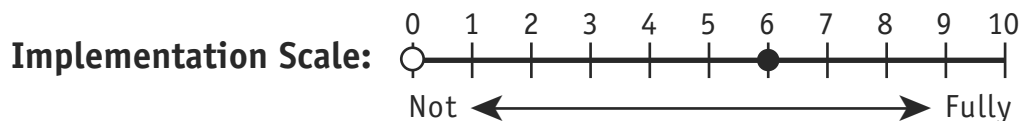
1. Human Resources has developed a new automated system for identifying employees who are eligible to receive Consolidated Omnibus Budget Reconciliation Act (COBRA) of 1986 notification. Whenever an employee separation is entered into the HRS software, a COBRA letter is generated.
2. A new software package has been developed to track the payment record for each employee and COBRA participant. The system provides periodic reports that identify participants who have missed a payment. The system allows the user to select an appropriate letter to inform the COBRA participant of the need to make a payment and the possibility of termination of benefits.

### **Recommendations to Address**

1. Continue to examine ways in which to improve timely notification of coverage eligibility.

### **Standard Implemented: Partially**

January 2000 Rating: 0  
September 2003 Rating: 6



## 13.6 Employee Benefits/Workers' Compensation

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### Professional Standard

Timely notice of annual open enrollment period is sent to all eligible employees.

### Progress on Implementing the Recommendations of the Improvement Plan

1. Human Resources sent open enrollment information in late August for a September open enrollment period. During the 30-day open enrollment period, a day is designated when employees may meet with representatives from Kaiser, Health Net, Delta Dental and Vision Services to get additional information.
2. In addition, the district has made arrangements for Kaiser and Health Net to send information directly to employees' homes regarding their respective benefit plans.
3. Information on health plans and open enrollment is also included on the district's Web page.

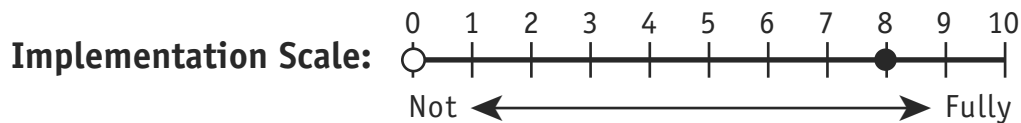
### Recommendations to Address

1. Continue to develop improved means of providing employees with timely notification of open enrollment activities.

### Standard Implemented: Fully - Substantially

January 2000 Rating: 0

September 2003 Rating: 8



## 13.9 Employee Benefits/Workers' Compensation

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### Professional Standard

The district's Workers' Compensation experiences and activities are reported periodically to the Superintendent's cabinet.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The district has not yet established a process that would periodically provide Workers' Compensation reports to the cabinet summarizing the year's activities. The district should have a process that creates a greater awareness at the decision making level of the number of accidents and costs associated with work-related injuries.

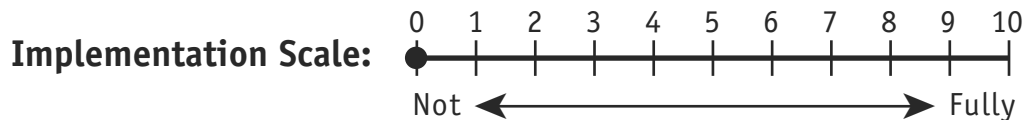
### Recommendations to Address

1. Periodically provide to the cabinet Workers' Compensation information. The report should include at a minimum the following information:
  - A review of the problem areas and suggested corrective measures.
  - Recommendations to the Superintendent's Cabinet for a districtwide program to address areas of need.

### Standard Implemented: Not Implemented

January 2000 Rating: 0

September 2003 Rating: 0



## 13.13 Employee Benefits/Workers' Compensation

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### Professional Standard

The Worker's Compensation unit is actively involved in providing injured workers with an opportunity to participate in a modified duty program.

### Progress on Implementing the Recommendations of the Improvement Plan

1. The district has not implemented a program to allow injured workers to return to work in a "light duty" status.

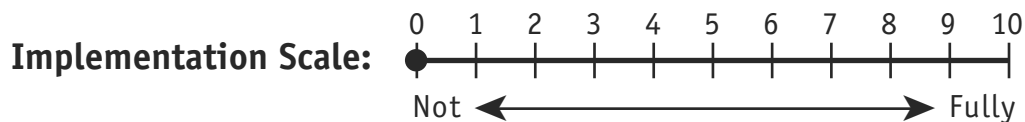
### Recommendations to Address

1. Establish a program that provides a formalized process for returning injured workers back to work in a modified work setting.

### Standard Implemented: Not Implemented

January 2000 Rating: 0

September 2003 Rating: 0





## Table of Standards for Personnel Management

The ratings of all of the standards initially reviewed and presented in the Oakland Unified School District Assessment and Recovery Plan, January 31, 2000 were reviewed and updated as appropriate to indicate the district's current progress in addressing the recommendations in the initial assessment and recovery plan. Additional standards have been added to the list of standards to reflect changes in legislation and/or regulation since the assessment and recovery plan was first published, and some standards have been reworded for clarity.

In-depth FCMAT reviews were conducted for the standards that appear in bold print in this table of standards. A narrative is provided in this report for each of the standards that appears in bold print, describing the progress made by the district since January 31, 2000, and outlining the recommendations that still need to be addressed to meet these standards.

A sub-set of 25 standards has been identified in this operational area that will be the focus of review in each six-month review period. These 25 standards are identified under the column titled "March 2004 Focus."





<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
1.1	An updated, detailed policy and procedures manual exists which delineates the responsibilities and operational aspects of the personnel office.	2	2	
1.2	The district has clearly defined and clarified roles for board and administration relative to recruitment, hiring, evaluation, and dismissal of employees.	2	3	
1.3	The division has developed a Mission Statement that sets clear direction for human resources staff.	7	8	
1.4	The division has an organizational chart and a functions chart that include the names, positions and job functions of all staff in the Human Resources Division.	6	6	
<b>1.5</b>	<b>The division has established goals and objectives directly related to the district's goals that are reviewed and updated annually.</b>	2	2	<input type="checkbox"/>
1.6	Individual staff members have developed goals and objectives in their areas of responsibility and also a personal professional development plan.	1	1	<input type="checkbox"/>
1.7	The division has a monthly activities calendar and accompanying list of ongoing Human Resources activities to be reviewed by staff at planning meetings.	3	3	<input type="checkbox"/>
1.8	The division head is a member of the Superintendent's Cabinet and participates in decision making early in the process.	10	10	
2.1	The Human Resources Division utilizes the latest technological equipment for incoming and outgoing communications.	2	5	
<b>2.2</b>	<b>The Human Resources and Business Divisions have developed and distributed a menu of services which includes the activities performed, the individual responsible, and the telephone numbers where they may be contacted.</b>	0	3	<input type="checkbox"/>
<b>2.3</b>	<b>The Human Resources Division provides an annual report of activities and services provided during the year.</b>	0	0	
<b>2.4</b>	<b>The Human Resources Division staff is cross trained to respond to client need without delay.</b>	2	2	
2.5	The Human Resources Division holds regularly scheduled staff meetings.	4	4	<input type="checkbox"/>
2.6	Various publications are provided on a number of subjects to orient and inform various clients.	5	6	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
3.1	The governing board will provide equal opportunities for all persons without regard to race, color, creed, sex, religion, ancestry, national origin, age, or disability. Education Code 44100-44105.	6	6	
3.2	Employment procedures and practices are conducted in a manner that ensures equal employment opportunities. Written hiring procedures are provided.	4	6	
<b>3.3</b>	<b>The job application form requests information that is legal, useful, pertinent, and easily understood.</b>	5	7	
3.4	The Human Resources Division recruitment plan includes a training component for the district recruitment team.	0	4	
3.5	The recruitment plan identifies placement centers, colleges and publications where there are significant numbers of candidates to meet the district's diverse needs.	3	5	
3.6	The recruitment plan provides a cost estimate (included in the division budget) for the recruitment program.	5	7	
<b>3.7</b>	<b>A summary or evaluation of the results of the year's recruitment efforts is provided in written form.</b>	0	4	<input type="checkbox"/>
3.8	Selection procedures are uniformly applied.	5	6	
<b>3.9</b>	<b>The district systematically initiates and follows up on experience and reference checks on all applicants being considered for employment.</b>	2	3	<input type="checkbox"/>
<b>3.10</b>	<b>The district appropriately monitors teacher assignments and reports as required under Education Code 44258.9.</b>	0	5	
4.1	The governing board will provide equal employment opportunities for persons without regard to race, color, creed, sex, religion, ancestry, national origin, age, or disability. Education Code 44100-44105.	7	7	
4.2	Employment procedures and practices are conducted in a manner that ensures equal employment opportunities. Written hiring procedures are provided. Education Code 44100-44105.	6	6	<input type="checkbox"/>
<b>4.3</b>	<b>The job applicant form requests information that is legal, useful, pertinent, and easily understood.</b>	7	7	
<b>4.4</b>	<b>The recruitment plan identifies various recruitment sources utilized in the search process for the numerous position classifications.</b>	2	5	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
4.5	The district systematically initiates and follows-up on all applicants being considered for employment.	5	5	
4.6	Appropriateness of required tests for a specific position is evident.	10	10	
<b>4.7</b>	<b>A summary of the recruitment efforts for the year is provided in written form.</b>	0	0	
5.1	Initial orientation is provided for all new staff.	4	7	
<b>5.2</b>	<b>The Human Resources Division provides orientation handbooks for new employee orientation in all classifications: substitutes, teachers and classified employees.</b>	2	4	<input type="checkbox"/>
5.3	The Human Resources Division has developed a video of the district's activities and expectations for new employee orientation.	0	2	
6.1	Personnel files are complete, well organized, and up-to-date.	2	3	
6.2	Human Resources Division nonmanagement staff members have individual desk manuals for all of the personnel functions for which they are held responsible.	0	0	<input type="checkbox"/>
<b>6.3</b>	<b>The Human Resources Division has an operations procedures manual for internal department use in order to establish consistent application of personnel actions.</b>	0	0	<input type="checkbox"/>
6.4	The Human Resources Division has a process in place to systematically review and update job descriptions. These job descriptions should be in compliance with the Americans with Disabilities Act (ADA) requirements.	5	1	<input type="checkbox"/>
6.5	The Human Resources Division provides an office environment with appropriate furniture, equipment and materials.	7	9	
6.6	The Human Resources Division has procedures in place that allow for both personnel and payroll staff to meet regularly to solve problems that develop in the processing of new employees, classification changes and employee promotions.	0	0	<input type="checkbox"/>
6.7	Wage and salary determination and ongoing implementation are handled without delays and conflicts (substitutes, temporary employees, stipends, and shift differential, etc.)	5	5	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
6.8	Regulations or agreements covering various types of leaves are fairly administered.	7	7	
6.9	Personnel staff members attend training sessions and workshops to keep abreast of the most current acceptable practices and requirements facing personnel administration.	6	6	
6.10	The Human Resources Division provides employees with appropriate forms for documenting requested actions (i.e., leave, transfers, resignations, and retirements).	10	10	
<b>6.11</b>	<b>Established staffing formulas dictate the assignment of personnel to the various sites and programs.</b>	7	7	
7.1	Policies and regulations exist regarding the implementation of fingerprinting requirements.	10	10	
7.2	The governing board requires every employee to present evidence of freedom of tuberculosis as required by state law. Education Code §§ 44839 and 49406.	10	10	
7.3	No person shall be employed as a teacher's aide unless that person has passed the basic reading, writing and mathematics skills proficiencies required for graduation from high school. Education Code § 45361.5	9	9	
7.4	A clear implemented policy exists on the prohibition of discrimination. Government Code § 11135.	8	8	
7.5	All certificated persons hold one or more valid certificates, credentials or life diplomas that allow the holder to engage in the school services designed in the document. Education Code § 44006.	3	6	
7.6	Duties to be performed by all persons in the classified service and other positions not requiring certification are fixed and prescribed by the governing board. Education Code § 45109.	6	6	<input type="checkbox"/>
7.7	Professional growth requirements for maintenance of a valid teaching credential exist. Education Code § 44277.	10	10	
7.8	Current position descriptions are established for each type of work performed by certificated and classified employees. Education Code § 35020.	6	6	<input type="checkbox"/>
7.9	The district has established a process by which all required notices/in-service training has been performed and documented, i.e., child abuse reporting, blood-borne pathogens, Hepatitis B vaccination, etc. Education Code § 44691 and Government Code § 8355.	7	7	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
7.10	The district is in compliance with the Title IX policies on discrimination and Government Code § 12950 (a) posting requirements concerning harassment or discrimination.	7	7	
7.11	The district is in compliance with the Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA)	5	7	
<b>7.12</b>	<b>The district is in compliance with the Family and Medical Leave Act (FMLA), including posting the proper notifications.</b>	2	4	<input type="checkbox"/>
7.13	The district is in compliance with the Americans with Disabilities Act (ADA) of 1990 in application procedures, hiring, advancement or discharge, compensation, job training and other items, conditions and privileges of employment.	4	5	<input type="checkbox"/>
7.14	The district has identified exempt and nonexempt employees and has promulgated rules and regulations for overtime, which are in compliance with the Fair Labor Standards Act (FLSA) and California statutes.	3	3	
<b>8.1</b>	<b>An online position control system is utilized and is integrated with the payroll/financial systems.</b>	0	0	<input type="checkbox"/>
<b>8.2</b>	<b>The Human Resources Division provides an automated substitute calling system. The system should have the ability to input and retrieve data. Data should be distributed to site and program managers.</b>	6	6	
8.3	The Certificated and Classified Departments of the Human Resources Division have in place an applicant tracking system.	4	4	
<b>8.4</b>	<b>The Human Resources Division has in place a program of providing funds and time for staff training and skill development in the use of computers.</b>	0	1	<input type="checkbox"/>
8.5	The Human Resources Division utilizes the latest technology to provide staff and clients with improved communication (e.g., voice mail, fax, and e-mail).	4	5	
8.6	The Human Resources Division has computerized its employee database system including, but not limited to, credentials, seniority lists, evaluations, personnel by funding source, program, location, and Workers' Compensation benefits.	4	4	
9.1	The district has developed a systematic program for identifying areas of need for in-service training for all employees.	4	5	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
9.2	The district shall make provisions for department-directed staff development activities, including a plan for “buy back” days for certificated and classified employees. Education Codes: 52000, 52034(g), and 44579-44579.4.	4	6	
9.3	Teachers and other professional school services personnel are provided diversity training. Education Code §44560.	3	4	
9.4	The district has adopted policies and regulations regarding the recognition and reporting of sexual harassment. Government Code 12940.	7	7	
<b>9.5</b>	<b>The district provides training for all management and supervisory staff responsible for employee evaluations.</b>	3	7	
9.6	The district provides training opportunities to managers and supervisors in leadership development and supervision.	4	5	
9.7	The division develops handbooks and materials for all training components.	3	3	<input type="checkbox"/>
<b>10.1</b>	<b>The Human Resources Division provides a process for the monitoring of employee evaluations and the accountability reporting of their completion.</b>	0	4	<input type="checkbox"/>
10.2	Standards for management and supervisors will be developed and implemented to ensure that adequate levels of supervision will be provided at all levels within the district.	2	6	
<b>10.3</b>	<b>A clear policy and practice exists for the written evaluation and assessment of certificated employees. Education Code § 44663</b>	5	8	
10.4	The evaluation process is a regular function related to each employee involving criteria related to the position.	2	5	
<b>10.5</b>	<b>The Human Resources Division has developed an evaluation handbook for management and supervisory training.</b>	2	8	
10.6	The Human Resources Division has developed due process training for managers and supervisors.	3	5	
10.7	The Human Resources Division has developed a process for providing assistance to marginal employees (remediation).	0	4	
<b>10.8</b>	<b>The district has developed a plan to address a Peer Assistance and Review Program (PAR). Education Codes 44498, 44500-44508, 44662, and 44664.</b>	0	8	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
11.1	The Human Resources Division has developed a program for retirement counseling, including STRS counseling, PERS counseling and “life after retirement.”	5	5	
11.2	<b>The Human Resource Division has developed recognition programs for all employee groups.</b>	2	7	
11.3	The Human Resources Division has available to employees various referral agencies to assist those employees in need.	3	3	
12.1	Salary schedules and benefits are competitive.	3	4	
<b>12.2</b>	<b>The Human Resources Division involves site-level administrators in the bargaining and labor relations decision-making process.</b>	4	4	<input type="checkbox"/>
12.3	The Human Resources Division provides all managers and supervisors (certificated and classified) training in contract management with emphasis on the grievance process and administration.	5	7	
12.4	The Human Resources Division provides a clearly defined process for the bargaining with its employee groups (e.g., traditional and interest-based).	8	8	
<b>12.5</b>	<b>The Human Resources Division has a process in place that provides management and the Board of Education with information on the impact of bargaining proposals (e.g., fiscal, staffing, management flexibility, and student outcomes).</b>	7	7	
12.6	The Human Resources Division provides clearly defined forms and procedures in the handling of grievances for its managers and supervisors.	7	7	
12.7	Bargaining proposals and negotiated settlements are “sunshined” in accordance with the law to allow public input and understanding of the cost implications and, most importantly, the effects on the children in the district. Education Code § 3547 and 3547.5, and Government Code § 41242.	5	7	
12.8	The district systematically has examined the feasibility of implementing the provisions of the law that provides for increasing the minimum teacher’s salary to \$32,000. Education Code § 45023.4.	5	8	

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.



<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
13.1	The district has its self-insured workers' compensation programs reviewed by an actuary in accordance with Education Code Section 17566 and filed with the County Office of Education.	4	7	
<b>13.2</b>	<b>Employee benefits are well understood by employees through periodic printed communications provided by the Human Resources Division.</b>	2	6	
13.3	Employees are provided reasonable notice of when coverage for dependents will end, and the documentation needed to continue coverage beyond the normal termination date.	9	10	
<b>13.4</b>	<b>Employees are provided immediate notification that premiums due under COBRA were not received timely and coverage stopped as of date specified.</b>	0	6	
13.5	Human Resources employees provide new hires with a detailed explanation of benefits, the effective date of coverage, along with written information outlining their benefits and when enrollment forms must be returned to implement coverage.	6	8	
<b>13.6</b>	<b>Timely notice of annual open enrollment period is sent to all eligible employees.</b>	0	8	
13.7	Employees are provided the state's injury report form (DWC Form 1) within one working day of the district having knowledge of an injury or illness.	8	8	
13.8	The district notifies the third party administrator of an employee's claim of injury within five working days of having knowledge and forwards a completed Form 5020 to them.	6	6	
13.9	<b>The district's Workers' Compensation experiences and activities are reported periodically to the Superintendent's cabinet.</b>	0	0	<input type="checkbox"/>
13.10	The district does not pay temporary disability benefits during those times when an employee is in an extended nonpay status.	6	7	
13.11	The Workers' Compensation Unit maintains the California OSHA log for all work sites and a copy is posted at each work site during the month of February as required.	10	10	
13.12	The district has provided the third party administrator with a copy of all current job descriptions and updates them, if needed, quarterly.	2	2	<input type="checkbox"/>

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.

<b>Standard to be addressed</b>		Jan. 2000 rating	Sept. 2003 rating	March 2004 focus
<b>13.13</b>	<b>The Workers' Compensation Unit is actively involved in providing injured workers with an opportunity to participate in a modified duty program.</b>	0	0	<input type="checkbox"/>

Standards in bold print were reviewed for the September 2003 report and narratives are provided in this report.  
 Indicates standards targeted for in-depth review for the March 2004 report.