



CSIS *California School Information Services*

Taft Union High School District

Human Resources Review

September 25, 2012



Joel D. Montero
Chief Executive Officer





CSIS California School Information Services

September 25, 2012

Marilyn Brown, Principal
Taft Union High School
1 Wildcat Way
Taft, CA 93268

Dear Principal Brown:

In April 2012, the Taft Union High School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement to provide a review of the district's human resource services. Specifically, the agreement states that FCMAT will perform the following:

Review and evaluate the classified, certificated, confidential, management, and administrative positions and job descriptions at the district office for all personnel related functions. The FCMAT Team will provide comparable data from school districts of similar size and demographics and make recommendations regarding the district's current staffing structure and position responsibilities to determine if a full time management level position is needed to direct the personnel functions of the district. This component will include a summary of comparable districts and identify the district's name, position titles and full time equivalent (FTE) positions.

This report contains the study team's findings and recommendations.

FCMAT appreciates the opportunity to serve you and we extend our thanks to all the staff of the Taft Union School District for their cooperation and assistance during fieldwork.

Sincerely,

Joel D. Montero
Chief Executive Officer

FCMAT

Joel D. Montero, Chief Executive Officer

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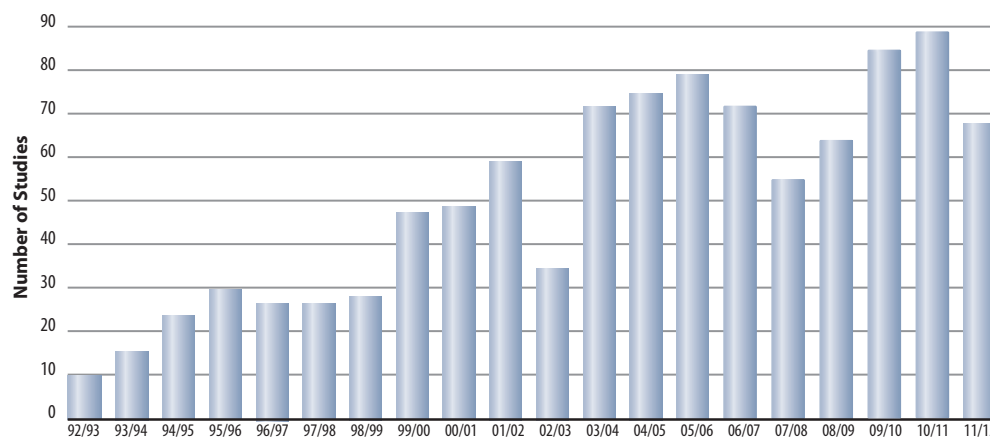
About FCMAT

FCMAT's primary mission is to assist California's local K-14 educational agencies to identify, prevent, and resolve financial and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT's fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices and efficient operations. FCMAT's data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and share information.

FCMAT may be requested to provide fiscal crisis or management assistance by a school district, charter school, community college, county office of education, the state Superintendent of Public Instruction, or the Legislature.

When a request or assignment is received, FCMAT assembles a study team that works closely with the local education agency to define the scope of work, conduct on-site fieldwork and provide a written report with findings and recommendations to help resolve issues, overcome challenges and plan for the future.

Studies by Fiscal Year



FCMAT also develops and provides numerous publications, software tools, workshops and professional development opportunities to help local educational agencies operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) arm of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS) and also maintains DataGate, the FCMAT/CSIS software LEAs use for CSIS services. FCMAT was created by Assembly Bill 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. Assembly Bill 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. Assembly Bill 1115 in 1999 codified CSIS' mission.

AB 1200 is also a statewide plan for county office of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (2004) provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans.

In January 2006, SB 430 (charter schools) and AB 1366 (community colleges) became law and expanded FCMAT's services to those types of LEAs.

Since 1992, FCMAT has been engaged to perform nearly 850 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Joel D. Montero, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

Introduction

Background

The Taft Union High School District serves approximately 1,050 students in one comprehensive and one alternative high school. The district is located in the city of Taft, which is in the southwest corner of Kern County, approximately 120 miles north of Los Angeles and 35 miles west of Bakersfield. The district draws students mainly from the Taft City School District, but also from the four rural elementary districts of Elk Hills, Midway, McKittrick and Belridge. The district benefits from a high funding level per student compared to other similar districts in the state because the area's petroleum industry activity contributes significantly to the tax base. The district is governed by a five-member elected governing board. The board has stable and committed members; three have served more than two terms and another is in his second term. In addition, four board members graduated from the district.

The district recently experienced personnel issues that were resolved, but raised concerns about its human resource management needs. This FCMAT study focuses on management oversight needs and not personnel issues.

In addition to FCMAT, the district has brought in external legal and transportation consultants to review areas of concern. The district regularly seeks consultation and guidance from professional organizations and experts to help meet district goals and legal requirements while protecting assets and maximizing resources.

According to the study agreement dated April 25, 2012 between FCMAT and the Taft Union High School District, the following services were requested:

1. Review and evaluate the classified, certificated, confidential, management, and administrative positions and job descriptions at the district office for all personnel related functions. The FCMAT Team will provide comparable data from school districts of similar size and demographics and make recommendations regarding the district's current staffing structure and position responsibilities to determine if a full time management level position is needed to direct the personnel functions of the district. This component will include a summary of comparable districts and identify the district's name, position titles and full time equivalent (FTE) positions.

Study Team

The study team was composed of the following members:

John F. Von Flue
FCMAT Management Analyst
Bakersfield, CA

William Voss
FCMAT Consultant
Bakersfield CA

Leonel Martínez
FCMAT Technical Writer
Bakersfield, CA

Debbie Fry*
Director of Business and Personnel
Lassen High School District
Oroville, CA

James Foley*
Assistant Superintendent, Business Services
Kerman Unified School District
Kerman, CA

*As members of this study team, these consultants were not representing their respective employers but were working solely as independent contractors for FCMAT.

Study Guidelines

FCMAT visited the district on June 12, 2012 to interview key staff members and review documentation. Additional documents were requested and interviews were held remotely through August, 2012. This report is the result of those activities and is divided into the following sections:

- I. Executive Summary
- II. Governance
- III. Human Resource Management
- IV. Organization
- V. Job Descriptions
- VI. Comparable Districts
- VII. Conclusion
- VIII. Appendices

Executive Summary

Because of a series of human-resource-related events, the Taft Union High School District requested that the Fiscal Crisis and Management Assistance Team (FCMAT) review its human resource administration, including developing a comparison of similar districts to determine the need for a personnel administrator.

The FCMAT study team, key administration, and district staff reviewed district policies, procedures, and job descriptions. In addition, FCMAT surveyed districts of similar size to compare human resource staffing structures.

A review of district policies indicated that the board realizes the value of district personnel and understands its role in district governance and human resource management. Existing policies provide the district with a strong foundation.

District procedures and implementation build on this foundation. FCMAT found that district staffing aligns with goals and statutory requirements. Training and evaluations ensure that employees are accountable, contractual agreements are followed, employee handbooks are current, and the district maintains strong relations with the staff and community. All district human-resource-related issues are quickly and efficiently resolved when policies and procedures are followed.

The district maintains the appropriate segregation of duties, and its organizational chart identifies key positions and lines of authority to ensure proper internal controls. Each district position has an approved job description; however, FCMAT found that some positions have several titles, and some job descriptions do not include all current responsibilities and roles. District job descriptions do not include all human-resource-related duties and functions for which the positions are responsible, and there is no job description for a human resource administrator.

FCMAT found multiple configurations for human resource administration in the comparison districts. Of the districts surveyed, only one had a dedicated human resource administrator. The others assigned the superintendent or the chief business officer (CBO) to oversee personnel duties. Among comparative districts, the Taft Union High School District was unique in combining its superintendent and principal positions.

Districts the size of Taft Union typically do not warrant a full-time human resource administrator. Instead, they usually divide personnel duties among the superintendent, principal, instructional and business administrative staff depending on their configuration. Taft Union can meet its human resource needs with the current administrative staff; however, it should regularly evaluate priorities, reassess needs, and adjust the administrative staff as staffing changes.

Findings and Recommendations

Personnel administration plays a significant role in district success. Effective human resource management; including staff recruitment, selection, orientation, training, accountability, retention, and complaint resolution; is necessary for high-quality and efficient services.

Governance

Human resource maximization requires the district governance to establish a solid foundation for human resource management, including defined and clarified roles for the board and administration. According to the Board Bylaw 9000, the board's role is to provide leadership and citizen oversight of the district. The board has authority only as a group, and each individual member has no authority Board Policy 9200). Board bylaws (Bylaw 9205) also establish expectations of each board member as follows:

1. Keep learning and achievement for all students as the primary focus.
2. Value, support and advocate for public education.
3. Recognize and respect differences of perspective and style on the Board and among staff, students, parents and the community.
4. Act with dignity, and understand the implications of demeanor and behavior.
5. Keep confidential matters confidential.
6. Participate in professional development and commit the time and energy necessary to be an informed and effective leader.
7. Understand the distinctions between Board and staff roles, and refrain from performing management functions that are the responsibility of the Superintendent and staff.
8. Understand that authority rests with the Board as a whole and not with individuals.

Individual board members are not to exercise any administrative responsibility or authority over schools or give direction to any school employee. When individual members request information or obtain correspondence, it should be submitted to the superintendent, who will then distribute this material to the board and/or place it on the board agenda so that the entire body is equally informed.

The district governing board's policies recognize the importance of personnel and state "that the success of the district students and programs hinges on effective personnel," according to Board Policy 4000. That policy also indicates that "personnel policies and related regulations should provide a supportive and positive climate and be consistent with bargaining agreements and legal requirements."

It is the board members' duty to review policy and ensure that new members are trained in their district role. The board collectively should require board members to regularly review board policy, ensure adherence to adopted policies, and provide the opportunity to perform these duties related to board policy.

Interviews with board and administration representatives indicated that the board of the Taft Union High School District has received regular governance training, members are aware of and regularly reference board policy, and they adhere to the district's established policies.

Recommendations

The district should:

1. Continue to ensure board members receive governance training.
2. Continue to ensure board members regularly reference and adhere to adopted board policy.
3. Continue to regularly review and collectively amend board policy to meet the needs and objectives of the collective board representing the community and legal requirements.

Human Resource Management

District human resource management involves administering key components to maintain appropriate placement, provide accountability, administer benefits, and provide a hospitable work environment. In most school districts, a human resources position plays a key role developing employees, practices and procedures. The human resources position works with district personnel to meet credentialing requirements and appropriate certification as established by the California Commission on Teacher Credentialing and the No Child Left Behind/highly qualified regulations. This position's major duties and responsibilities would include the following:

- Recommending to the superintendent the appointment, placement, suspension, promotion or dismissal of all employees.
- Supervising the evaluation of all employees.
- Reviewing the interview team's recommendation for presentation to the superintendent for employment.
- Maintaining a roster of eligible substitute teachers.
- Developing or helping in the development of employee job descriptions and classifications
- Assisting in the development and implementation of the districts affirmative action plan.
- Ensuring compliance with all current collective bargaining contracts pertinent to the district, and typically serving as district chief negotiator.

FCMAT found that district vacancies are expediently filled with qualified staff members, indicating that the district has adequate recruitment and retention programs and an efficient and responsive hiring process. The district also has a system to routinely monitor teacher assignments for the appropriate credential authorization, including Crosscultural Language and Academic Development (CLAD) or other documents necessary to instruct English-language learners. All new staff members are provided with an initial orientation, and orientation materials are given to all new substitute, certificated, and classified employees. The district has developed a systematic program to determine in-service training needs for all employees. A process has also been established to ensure employees receive notices for all required in-service training sessions and that these sessions are provided and documented, including those on child abuse reporting, blood-borne pathogens, drug and alcohol-free workplace, sexual harassment, diversity, and nondiscrimination.

The board believes regular and comprehensive evaluations can help staff members improve their skills and maximize student achievement. Evaluations also serve to hold employees accountable for their performance. The board requires the superintendent or designee to evaluate the performance of certificated staff members according to the law, negotiated employee contracts, and board-adopted evaluation standards (Board Policy 4115). The district has established performance evaluation forms and procedures for the certificated and classified staffs. The certificated evaluation form and process were recently updated and are in the process of being reviewed and adopted by the certificated bargaining unit. The district also maintains an evaluation handbook to clearly communicate the purpose, goal, and process of certificated evaluations. The district has a system to schedule and track employee evaluations to ensure they are completed in a timely and regular manner. The system indicates that employees are evaluated according to legal, contractual, and district requirements.

FCMAT found no problems with employment leaves, indicating they are fairly administered. This requires accurate and timely tracking of employee absences and time off.

The district's bargaining contracts are current, and there are no active grievances, indicating that the district and bargaining unit have frequent interaction and a strong relationship.

The board believes it is important to establish a process for employees to have their concerns heard promptly and without bias (Board Policy 1312.1), and that employees should make every effort to resolve complaints and disagreements informally before filing a formal complaint with the administration (Board Policy 4144). Since individual board members do not have the authority to resolve complaints, any board member approached directly by a person with a complaint should refer the complainant to the superintendent or designee so that the problem may receive proper consideration and be handled through the appropriate process. The board should hear employee complaints and appeals only when they remain unresolved following district procedure and negotiated agreement resolution attempts (Board Policy 4000).

The board also recognizes that employees are accountable to the public (Board Policy 1312.1). The superintendent is required to develop regulations that permit the public to file complaints against district employees in an appropriate way. This process requires the superintendent, who has primary responsibility for overseeing the district's personnel, to investigate and attempt resolution. The superintendent's job description states that "problems, requests, complaints, and suggestions concerning the affairs of the school which may be presented by individuals in all matters regarding board policies shall be referred to the office of the superintendent." According to board policy, the board should hear complaints only if they remain unresolved after the district process is followed, and they should never be heard by an individual board member.

The district classified employee handbook is a comprehensive overview of the district mission and policies and is provided to all classified employees. The handbook provides clear direction for complaint resolution, including designating the business manager as a second tier to the complaint resolution process if the employee's supervisor does not resolve the complaint at the first level.

However, through interviews and documentation review, FCMAT found instances in which district prescribed procedures were not followed. In one instance, district administration was bypassed, and complaints were submitted directly to individual board members as comments during an open board meeting. In another instance, board policy, district procedures, and the contract between the district and the employee union were violated when an employee discipline issue was submitted directly to a board member without following protocols. In a third instance, protocols appear to have been followed appropriately, and the concerns that arose were promptly answered with openness and efficiency.

The district's board policies and procedures provide an adequate process for resolving complaints. However, FCMAT found situations in which these procedures, including the chain of command and lines of responsibilities, were not followed. This allowed the complaint process to become influenced by parties that were not aware of the full scope of the issues or the resolution process. Adhering to policy and procedures would have allowed for more efficient resolution.

The personnel function has procedures that allow for personnel and payroll staff members to solve problems that develop during the processing of new employees, classification changes, employee promotions, and other issues.

High school districts such as Taft Union have additional personnel administration requirements such as those involving staffing, credentialing, and assignment of single-subject teachers and additional activities because of the transitory nature of coaches, walk-on coaches, and volunteers in all the high school activities.

Recommendations

The district should:

1. Consider creating job functions for human resources/personnel responsibilities.
2. Consider disseminating human resources duties and related functions to other administrative positions.

Organization

Authority in a public school district originates with the elected governing board, which employs a superintendent to oversee the district. Through the superintendent, authority and responsibility are delegated to the district administrators and staff. The Taft Union board policy provides the superintendent with the authority to organize the administrative staff in a manner that best enables the district to provide an effective instructional program (Board Policy 2100). The superintendent may also adjust staff responsibilities temporarily or permanently to accommodate the workload and/or individual capabilities.

Segregation of Duties and Responsibilities

Proper internal controls and a distribution of authority in an organization are necessary to prevent fraudulent activity and to help find and correct errors. In human resources, it is important to segregate duties involving hiring and employee compensation. Using best practices, the board would retain the authority to establish vacancies and provide the final hiring authorization. The Business Department would account for each board-established position in the district budget as well as maintain salary and benefit schedules. The Human Resources Department is responsible for recruiting, verifying employment eligibility and credentials, and establishing the employee as a district staff member. These duties should be separated to ensure appropriate hiring and compensation.

The following table provides a suggested distribution of labor between the Human Resources and Business departments that maintains a high level of internal control:

Assignment	Accountability
Position authorization	Governing Board
Enter board-authorized positions into position control with estimated salary and benefits.	Business Department
Input demographic data: Employee name, address, Social Security number, credential, classification, salary schedule placement and annual review information	Human Resources
Update salary schedules, work calendars and employees benefits.	Business Department
Budget development, multiyear projections, salary projections and account code information.	Business Department

The Taft Union Business and Personnel departments are overseen by the CBO, who is also known as the director of human resources and the business manager. This may seem to conflict with the suggested segregation of duties; however, business and human resource responsibilities are delegated to different individuals. FCMAT believes this configuration, in addition to the board maintaining authority to authorize positions and approve the employment of individuals, provides sufficient internal controls.

Recommendations

The district should:

1. Ensure segregation of duties for establishing a vacancy, hiring, and compensating staff members.
2. Clearly establish and identify the administration responsible for the key duties of personnel administration.

Organizational Chart

The most recent district organizational chart was adopted and approved in September 2011 and is attached as Appendix A to this report. In the 2011-12 organizational chart, the superintendent/principal and board have direct oversight of the director of business and human resources, and the director of curriculum, instruction and assessment while the principal (the principal and the superintendent/principal are one FTE position) has direct oversight of the director of student services, department chairs, athletic director, and continuation/opportunity school principal. The director of business and human resources oversees the maintenance operations and transportation manager, the food services manager, and the instructional technology manager. At the time of fieldwork, the superintendent and principal equated to one full-time equivalent (FTE) position that was filled by the same person with the title of superintendent/principal.

While the organizational chart clearly defines lines of authority, the titles and roles of administration are unclear; staff members indicated they are confused regarding title and rank of administrative positions. Staff members with the titles of directors and managers apparently have different authority levels. The CBO was recently referred to as the business manager and the director of business and human resources in various documents and memorandums. Those interviewed clearly identified the CBO as the human resources authority; however, FCMAT was unable to determine whether all staffing ranks and the board clearly understand this.

When titles are used interchangeably, they fail to clearly identify levels of authority, causing confusion. This makes it difficult for employees with interchangeable titles to fulfill their responsibilities and affects subordinates, who may become confused when trying to follow the chain of command or identify the correct superior. This lack of clarity may also prompt staff and community members to present their concerns to a higher-level authority such as the superintendent or the governing board.

Recommendations

The district should:

1. Ensure the district organizational chart clearly identifies positions, hierarchy, and lines of authority.
2. Review and update position titles to provide consistency in the identification of positions, their authority and the level of responsibility.

Job Descriptions

FCMAT reviewed the personnel responsibilities and authority included in district job descriptions. The responsibilities of human resource management are shared by the superintendent/principal and CBO.

Superintendent/Principal

According to Board Policy 2110 and the superintendent job description, the superintendent is the executive officer of the governing board and is directly responsible to this body. As executive officer, the superintendent is responsible for implementing the board's policies and directives. The superintendent's personnel responsibilities include recommending the appointment, transfer, promotion, demotion, suspension or dismissal of all employees, subject to the approval of the board. The superintendent also assigns all employees within their classification so they can best serve the district. The superintendent may recommend leaves of absence for employees when in the superintendent's judgment, it will benefit the district. Further, the superintendent enforces and observes all laws concerning schools and the rules and regulations of the state Department of Education.

At the district, the superintendent also serves as principal for Taft High School, and the job description states that this position is the immediate supervisor of the school's certificated employees. This includes involvement in hiring, evaluating, assigning, disciplining, retaining, and resolving concerns. The principal is the only employee with personnel duties listed on the job description.

Chief Business Official

The CBO job description includes the duty of supervising the performance of assigned personnel. FCMAT interprets this as a supervisory function and not an HR function. However, the employees assigned to the CBO include support staff members that are assigned to perform human resources processing such as recruiting, hiring, providing orientation and retention; managing personnel files; administering leaves; providing position control; and compensation and benefits.

The business manager job description, the title of which is used interchangeably with the CBO, includes the responsibilities of helping recruit, screen, hire, supervise, and evaluate all classified personnel.

There is no job description for the director of business and human resources, and this title is used alternately with that of the CBO.

The chief business official's job description states that this position has a minimal districtwide role in personnel-related duties. During interviews, staff members identified the CBO as the superintendent's personnel designee for classified employees and as the position responsible for some certificated issues including evaluations. Because of these duties, the CBO has received human resource training and certification. Staff members also indicated that the CBO is the administrative position most involved with maintaining personnel-related legal standards; bargaining unit contract negotiations, interpretation, and implementation; and resolving personnel issues. This position does not require the administrative services credential necessary to evaluate certificated personnel. This is an area of concern since the CBO's exact role cannot be easily determined by reviewing the job description. If the district decides that the CBO should

retain these human resource responsibilities, a job description for a human resources manager or personnel manager should be developed and designated to the CBO, providing clear direction on roles and responsibilities. Another option is to rewrite the CBO's job description to include human resources/personnel responsibilities.

Director of Curriculum, Instruction and Assessment

According to the job description for the director of curriculum, instruction and assessment, this position requires an administrative services credential because it is responsible for evaluating certificated and classified employees. This position is also responsible for the induction process for new and probationary teachers.

Other Job Descriptions

FCMAT requested all district job descriptions and reviewed those provided. The district maintains positions to provide administrative, accounting, and technical support that assist with human resource related duties, including implementing district human resource processes, scheduling personnel evaluations, tracking credentials, and maintaining files. However, FCMAT evaluated all job descriptions and found no human resource functions in any other job descriptions.

The only job description that clearly includes responsibility for human resources is the Taft High principal, and all others have supervisory responsibilities. During interviews, staff members consistently identified the CBO as the district's designated human resource contact. This designation would be more evident and clearly defined if the responsibilities were included in the job description and indicated in the job title.

Recommendations

The district should:

1. Clearly identify and designate human resource responsibilities to an administrator or administrators.
2. Review and revise job descriptions to list human resource responsibilities on the appropriate positions.
3. Review and revise job titles to reflect the appropriate duties, including those related to human resources or personnel administration.

Comparable Districts

High school districts need more human resources involvement than elementary districts mostly because of the specific credentialing requirements for single-subject teachers, additional activities and clubs and the volume of part-time, seasonal, or temporary employees for athletic programs. FCMAT performed a comparative review of similar California high school districts and found that although these unique characteristics require additional work, districts the size of Taft Union usually absorb those duties with existing staff instead of having a staff member dedicated solely to human resource functions.

Each district reviewed except one assigns the superintendent, CBO, administrative assistant, or a combination of these staff members to perform human resources functions. The Exeter High School District, which has an enrollment of 1,168, employs a deputy superintendent for certified personnel functions.

In interviews with comparison districts, it was evident that the division of work generally occurs between the initial paperwork and orientation (normally managed with the support of an administrative assistant) and conflict resolution, discipline, and evaluation (normally managed by an administrator).

Worker's compensation and employee absence tracking functions are typically managed in the business area, the human resources area, or both. Because each district has a unique method of performing these functions, no method or staffing formula was available for review.

The following tables provide data for each comparative district. The first table indicates the district, enrollment, and functions performed at the district level.

High School District Comparison Data

	Enrollment	Certificated Teacher FTE	Superintendent	Human Resources	Business Services	Ed Services
Chowchilla	1031	43.6	I	Supt. Secty.	CBO	Director
Corning	933		I	Supt. Secty. & CBO	CBO	Director
Exeter	1168	45.83	I	Deputy Supt	CBO	Director
Fortuna	1122	48.8	I	Supt. Secty.	CBO	Supt. & Principal
Kingsburg	1157	48.42	I			Did not Respond
Lassen	987	41.4	0.48	Supt. Secty. & CBO	CBO	Supt. & Principal
Santa Ynez Valley	1073	55.9	I	Supt. Secty.	CBO	Supt & Principal
Summerville	973	46.4	I	Supt. Secty.	CBO	2 Coordinators
Taft	1056	71.57	0.5	Supt. Secty. & CBO	CBO	Director

Source: District contacts/Ed-Data/School Services of California Statistics

As shown above, four districts in this group rely on the superintendent to administrate personnel while three involve the CBO. Only one district identifies a human resources administrator.

The second table provides information regarding the ranking of the selected comparison districts based on 2010-11 data for various factors related to salary and benefit expense.

Ranking Among Top 50 High School Districts with ADA or More Than 500 (of 68 Districts) - Part I

	Lowest Scheduled Salary	BA + 60, Step 10	Maximum Scheduled Salary	Average Scheduled Salary	Certificated Nonmanagement Salary Expense*
Chowchilla					
Corning					25
Exeter	34			43	
Fortuna					
Kingsburg	32	47	48	35	48
Lassen			49		
Santa Ynez Valley	22	28	34	20	13
Summerville					
Taft	14	18	15	10	1

Ranking Among Top 50 High School Districts with ADA or More Than 500 (of 68 Districts) - Part II

	Classified Nonmanagement Salary Expense*	Administrator Salary Expense*	Health & Welfare Benefit Expense*	Personnel Salary & Benefit Expense*	Classroom Personnel Expense*
Chowchilla	46	22		23	
Corning	25		22	42	
Exeter		40	43	47	
Fortuna	27	6	9	29	31
Kingsburg		13	12	6	4
Lassen	15		42		
Santa Ynez Valley	21	49	38		
Summerville					
Taft	1		1		

Taft Union ranks first in nonmanagement salary expense for certificated and classified employees and for health and welfare benefit expenses per ADA. The administrator salary expense did not rank, and these statistics indicate that the total cost for administration per ADA is low. This ranking is most likely because the district has a combined superintendent/principal position, saving the cost equivalent to a principal.

Conclusion

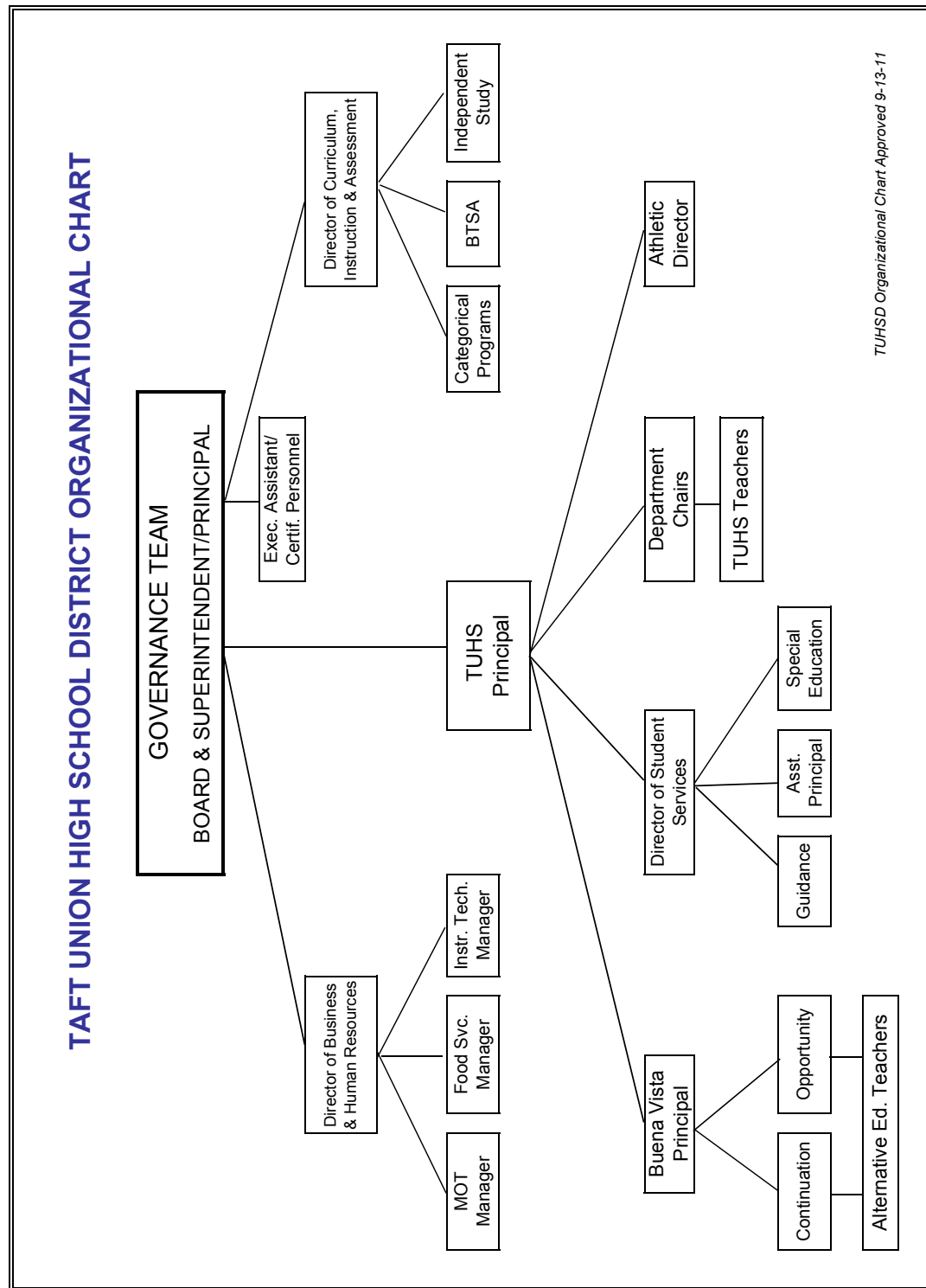
A district the size of the Taft Union High School District typically does not need a full-time administrator for human resources. Instead, these districts usually divide instructional, business, and personnel duties among other staff members such as the superintendent and another executive administrator such as an assistant superintendent or chief officer. A district will then hire support staff for the areas of additional need. Taft Union historically maintained the necessary and appropriate human resource management with its existing administration and staff. However, district needs and staff members can change frequently and should be evaluated regularly to determine the appropriate staffing at all levels. If the district continues to combine the superintendent/principal positions, it may need to consider adding the support of additional administration such as a human resource specialist.

Appendices

A. District Organizational Chart

B. Study Agreement

Appendix A. - District Organizational Chart



Appendix B. - Study Agreement

FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

CSIS California School Information Services

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT

April 25, 2012

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Taft Union High School District, hereinafter referred to as the District, mutually agree as follows:

1. BASIS OF AGREEMENT

The Team provides a variety of services to school districts and county offices of education upon request. The District has requested that the Team provide for the assignment of professionals to study specific aspects of the Taft Union High School District operations. These professionals may include staff of the Team, County Offices of Education, the California State Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this Agreement.

In keeping with the provisions of AB1200, the County Superintendent will be notified of this agreement between the District and FCMAT and will receive a copy of the final report. The final report will be published on the FCMAT website.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

The Taft Union High School District is requesting the FCMAT Team to conduct an organizational review of the district's central office and will include the following:

1. Review and evaluate the classified, certificated, confidential, management, and administrative positions and job descriptions at the district office for all personnel related functions. The FCMAT Team will provide comparable data from school districts of similar size and demographics and make recommendations regarding the district's current staffing structure and position responsibilities to determine if a full time management level position is needed to direct the personnel functions of

the district. This component will include a summary of comparable districts and identify the district's name, position titles and full time equivalent (FTE) positions.

B. Services and Products to be Provided

Orientation Meeting - The Team will conduct an orientation session at the District to brief District management and supervisory personnel on the procedures of the Team and on the purpose and schedule of the study.

On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.

1. Exit Report - The Team will hold an exit meeting at the conclusion of the on-site review to inform the District of significant findings and recommendations to that point.
2. Exit Letter - The Team will issue an exit letter approximately 10 days after the exit meeting detailing significant findings and recommendations to date and memorializing the topics discussed in the exit meeting.
3. Draft Reports - Electronic copies of a preliminary draft report will be delivered to the District administration for review and comment.
4. Final Report - Electronic copies of the final study report will be delivered to the District administration following completion of the review. Written copies are available by contacting the FCMAT office.
5. Follow-Up Support – Six months after the completion of the study, FCMAT will return to the District, if requested, to confirm the District's progress in implementing the recommendations included in the report, at no cost. Status of the recommendations will be documented to the District in a FCMAT Management Letter.

3. PROJECT PERSONNEL

The study team will be supervised by Anthony L. Bridges, CFE, Deputy Executive Officer, Fiscal Crisis and Management Assistance Team, Kern County Superintendent of Schools Office. The study team may also include:

A. John F. Von Flue

FCMAT Fiscal Intervention Specialist

B. Toni Smith

FCMAT Consultant

Other equally qualified consultants will be substituted in the event one of the above noted individuals is unable to participate in the study.

4. **PROJECT COSTS**

The cost for studies requested pursuant to E.C. 42127.8(d)(1) shall be:

- A. \$500.00 per day for each Team Member while on site, conducting fieldwork at other locations, preparing and presenting reports, or participating in meetings.
- B. All out-of-pocket expenses, including travel, meals, lodging, etc. The District will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon acceptance of the final report by the District.

Based on the elements noted in section 2 A, the total cost of the study is estimated at \$8,000.

- C. Any change to the scope will affect the estimate of total cost.

Payments for FCMAT services are payable to Kern County Superintendent of Schools - Administrative Agent.

5. **RESPONSIBILITIES OF THE DISTRICT**

- A. The District will provide office and conference room space while on-site reviews are in progress.
- B. The District will provide the following (if requested):
 - 1. A map of the local area
 - 2. Existing policies, regulations and prior reports addressing the study request
 - 3. Current or proposed organizational charts
 - 4. Current and two (2) prior years' audit reports
 - 5. Any documents requested on a supplemental listing
 - 6. Any documents requested on the supplemental listing should be provided to FCMAT in electronic format when possible.
 - 7. Documents that are only available in hard copy should be scanned by the district and sent to FCMAT in an electronic format.
 - 8. All documents should be provided in advance of field work and any delay in the receipt of the requested documentation may affect the start date of the project.

- C. The District Administration will review a preliminary draft copy of the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the Team prior to completion of the final report.

Pursuant to EC 45125.1(c), representatives of FCMAT will have limited contact with pupils. The District shall take appropriate steps to comply with EC 45125.1(c).

6. PROJECT SCHEDULE

The following tentative schedule outlines the planned completion dates for key study milestones:

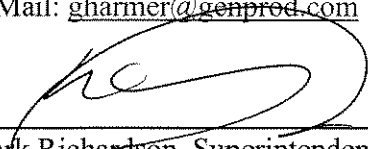
<i>Orientation:</i>	<i>to be determined</i>
<i>Staff Interviews:</i>	<i>to be determined</i>
<i>Exit Interviews:</i>	<i>to be determined</i>
<i>Preliminary Report Submitted:</i>	<i>to be determined</i>
<i>Final Report Submitted:</i>	<i>to be determined</i>
<i>Board Presentation:</i>	<i>to be determined</i>
<i>Follow-Up Support:</i>	<i>if requested</i>

7. CONTACT PERSON

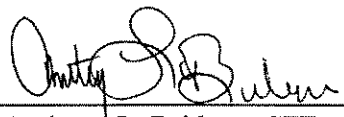
Name of contact person: George Harmer

Telephone: (661) 340-7266 FAX: _____

E-Mail: gharmer@genprod.com


 Mark Richardson, Superintendent
 Taft Union High School District

4-26-12
 Date


 Anthony L. Bridges, CFE
 Deputy Executive Officer
 Fiscal Crisis and Management Assistance Team

April 25, 2012
 Date