



FCMAT

FISCAL CRISIS & MANAGEMENT
ASSISTANCE TEAM

Temple City Unified School District

Personnel Review

April 2, 2007

Joel D. Montero
Chief Executive Officer



April 2, 2007

Dr. Joan C. Hillard, Superintendent
Temple City Unified School District
9700 Las Tunas Drive
Temple City, CA 91780

Dear Dr. Hillard:

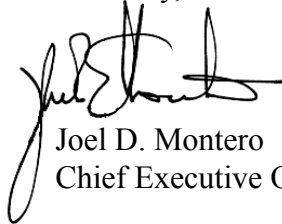
In October 2006, the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement with the Temple City Unified School District for a management review. Specifically, the agreement asked FCMAT to perform the following:

1. Conduct an organizational review of the district's personnel office to analyze the following factors:
 - i. Distribution of workload
 - ii. Determination of functions that generally fall under other departments in other school districts
 - iii. Impact of responsibilities required as a merit system district
 - iv. Automation of employee and applicant information collection and retention
 - v. Staffing comparisons of like sized unified merit system districts

FCMAT visited the district January 22 and 23, 2007. This report is the result of that effort.

We appreciate the opportunity to serve you, and we extend our thanks to all the staff of the Temple City Unified School District.

Sincerely,



Joel D. Montero
Chief Executive Officer

FCMAT

Joel D. Montero, Chief Executive Officer

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Foreword

FCMAT Background

The Fiscal Crisis and Management Assistance Team (FCMAT) was created by legislation in accordance with Assembly Bill 1200 in 1992 as a service to assist local educational agencies in complying with fiscal accountability standards.

AB 1200 was established from a need to ensure that local educational agencies throughout California were adequately prepared to meet and sustain their financial obligations. AB 1200 is also a statewide plan for county offices of education and school districts to work together on a local level to improve fiscal procedures and accountability standards. The legislation expanded the role of the county office in monitoring school districts under certain fiscal constraints to ensure these districts could meet their financial commitments on a multiyear basis. AB 2756 provides specific responsibilities to FCMAT with regard to districts that have received emergency state loans. These include comprehensive assessments in five major operational areas and periodic reports that identify the district’s progress on the improvement plans

Since 1992, FCMAT has been engaged to perform more than 600 reviews for local educational agencies, including school districts, county offices of education, charter schools and community colleges. Services range from fiscal crisis intervention to management review and assistance. FCMAT also provides professional development training. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The agency is guided under the leadership of 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.

Total Number of Studies 628

Total Number of Districts in CA..... 982

● Management Assistance..... 594 (94.59%)

● Fiscal Crisis/Emergency 34 (5.41%)

Note: Some districts had multiple studies.

● Districts (7) that have received emergency loans from the state.

(Rev. 2/7/07)

Study Agreements by Fiscal Year

Fiscal Year	Number of Studies
92/93	10
93/94	15
94/95	23
95/96	29
96/97	26
97/98	26
98/99	27
99/00	47
00/01	48
01/02	58
02/03	34
03/04	71
04/05	73
05/06	78
06/07	82 (Projected)

Temple City Unified School District

Introduction

Background

The Temple City Unified School District is located in the West San Gabriel Valley in the county of Los Angeles. The district, which serves students in Temple City as well as small portions of San Gabriel and Arcadia and other incorporated areas, includes a comprehensive high school, an alternative high school, a junior academy, an intermediate school, four elementary schools, and an adult education school.

According to the district's Web site, approximately 390 full-time and 350 part-time staff members are employed by the district. Because Temple City Unified is a merit system district, actions related to classified employees are subject to the provisions of Education Code sections 45240 through 45320.

On October 5, 2006 FCMAT received a request from the district to conduct a management assistance review of specific elements of the Personnel Services Department. The study agreement between FCMAT and the district identifies the following scope of work:

1. Conduct an organizational review of the district's personnel office to analyze the following factors:
 - i. Distribution of workload
 - ii. Determination of functions that generally fall under other departments in other school districts
 - iii. Impact of responsibilities required as a merit system district
 - iv. Automation of employee and applicant information collection and retention
 - v. Staffing comparisons of like sized unified merit system districts

Study Guidelines

The study team was composed of the following members:

Barbara Dean
FCMAT Deputy Administrative Officer
Bakersfield, CA

Toni Smith*
Director of Human Resources
Kern County Superintendent of Schools
Bakersfield, CA

Leonel Martínez
FCMAT Public Information Specialist
Bakersfield, CA

*As a member of the study team, this consultant was not representing her employer but was working solely as an independent consultant for FCMAT.

Prior to the on-site review, FCMAT provided an extensive document request and interview list so that the district could prepare for the on-site review.

The FCMAT study team visited the district on January 22-23, 2007 to meet with the district staff and to review the collected records and documents. At the conclusion of the team's visit, Personnel Services employees were asked to respond in writing to five questions related to workload, use of overtime, use of spreadsheets, the tasks that should be considered if additional staff members were added to the department, and the single change that would provide them with more time to get the job done.

This report is a result of those activities and is divided into the following sections:

- I. Executive Summary
- II. Workload Distribution
- III. Determination of Functions
- IV. Merit System Impact
- V. Automation of Processes
- VI. District Staffing Comparisons
- VII. Staff Responses to FCMAT Questions

Executive Summary

The district is recruiting a new Assistant Superintendent of Personnel Services. The employee currently in this position is retiring after 26 years with the district, the last eight years in this position. The retirement will result in the loss of institutional memory and necessitate the transfer of certain tasks not generally assigned at the Assistant Superintendent level. These tasks include generating all official correspondence, updating job descriptions, and typing and formatting all the changes to collective bargaining contracts following negotiations.

The Personnel Department staff is composed of three employees, a Personnel Assistant, Personnel Technician, and Receptionist, all working at capacity. The tasks of keeping report deadlines, hiring staff, monitoring credentials, and processing necessary employee paperwork are performed appropriately, but more routine tasks may not be kept up to date.

Employees maintain Excel spreadsheets for substitute tracking and monitoring teacher educational and credential information, substitute teacher days worked, all English Learner (EL) and Cross-cultural, Language and Academic Development (CLAD) information, tracking employees requesting summer work, absence information, performance evaluation due dates, classified and certificated seniority lists, annual vacation and sick leave accruals, summer school employment, job history information, credential information, certificated staff salary placement and college units, No Child Left Behind (NCLB) monitoring, and classified employee classification and status information.

The district should contact the Los Angeles County Office of Education to confirm what opportunities exist to maximize the use of the county office's Human Resource Services (HRS) system and prioritize time for staff training, when possible. The initial focus should be on position control and absence tracking. As noted in a 2006 FCMAT management review of the district's business office, the Personnel and Business departments do not use an integrated system for position control.

If no options exist for automation through the county office, the district should consider assigning technology staff members to enter spreadsheet information into a database and provide staff training in its use, or hire an outside technology consultant for this purpose. The use of automated systems or software programs could reduce duplication of information in spreadsheets and the amount of time currently dedicated to data management.

The district will need to add a partial or full-time clerical support position to the department so that the current staff can absorb the tasks of the Assistant Superintendent position. This clerical position could also provide backup for the Receptionist during break and lunch periods as well as when the Receptionist is ill or on vacation. This will reduce the amount of time staff members spend away from their normal work assignments to back up the Receptionist.

Cross training between department positions should be initiated, beginning with credential monitoring. Redirecting employees to the health plan providers or insurance carrier for questions regarding benefit coverage or claims would provide staff members with additional time to better concentrate on their work.

The number of applicant questions on open positions could be reduced if pertinent information regarding testing and interview requirements for classified positions were included on the job postings. Identifying testing and interview dates in advance would help applicants plan their availability should they meet job qualifications.

Four of six unified merit system districts contacted by FCMAT provided comparative staffing information, which is included in detail in this report. There are no standard staffing formulas for school district classified positions other than custodial formulas available through the California Association of School Business Officials.

District	Temple City	Bassett	Los Baños	San Lorenzo	Castro Valley
County	Los Angeles	Los Angeles	Merced	Alameda	Alameda
2005-06 Enrollment	5,709	5,659	8,768	11,613	8,629
Personnel/Commission FTE	4	8	5.5	9	4

Enrollment data obtained from Ed Data Web site

Employee responses to the five questions asked by the study team are included in the body of this report and confirm concerns regarding the impact of the hiring of a new Assistant Superintendent, that overtime is occasionally worked voluntarily to finish work that needs to be done and keep things in order, that automation of data management would be helpful but time won't allow employees to work on the conversion, and that clerical support could provide needed assistance with some of the merit system tasks.

Findings and Recommendations

Workload Distribution

Temple City Unified School District's Personnel Assistant, Personnel Technician, and District Receptionist are currently working at full capacity. The work appears to be evenly distributed, and the complexity and level of responsibilities of the job duties assigned to each staff member is within the scope of the individual job descriptions. The district's emphasis on customer service in all departments is admirable, although the amount of time necessary to effectively serve school sites and employees affects department personnel and diverts them from their ongoing tasks. Making report deadlines, hiring staff, monitoring credentials, and processing necessary employee paperwork are performed appropriately, but more routine tasks may not be completed in a timely manner.

Staff members indicated they are concerned about the effect that replacing the Assistant Superintendent will have on the workload of the existing three staff members. The Assistant Superintendent performs many tasks that after retirement may be redistributed to the department staff. These tasks include typing contract updates for three bargaining units, creating and revising all job descriptions, and completing all "Golden Handshake" paperwork and calculations.

The Personnel Assistant is assigned to certificated personnel duties and supervises the other two department employees. This position monitors credentials, maintains personnel files, and helps with tasks related to No Child Left Behind legislation, recruitment flyers, master teachers, interns, and contracts. Much of the Personnel Assistant's time is spent providing customer service to school sites, administrators, department heads, and employees. The Personnel Assistant has been with the district for 33 years and is often a first point of contact because the individual in this position has 25 years of experience in the business office and Payroll Department. Other tasks include coding time sheets for hourly overtime, maintaining Excel spreadsheets with employment history for active employees, preparing the monthly personnel commission agenda -- which takes approximately three days -- and taking minutes for commission meetings.

The Personnel Technician is assigned to classified personnel and is responsible for performing the duties required of a merit system district. These duties include many clerical tasks that could be handled by a clerical support staff member such as maintaining eligibility lists, interview materials, tests, and correspondence to applicants. The Personnel Technician maintains absence tracking on an Excel spreadsheet for administrator's nonduty days, monitors and sends notifications for classified evaluations, monitors vacation accrual rates, sends reasonable assurance letters, coordinates the three open enrollment periods, and prepares board agendas, in addition to other tasks. Manual posting of classified employees' position history is maintained on "blue cards."

The Personnel Technician has been with the district for 22 years, with three years in personnel.

The Receptionist answers the district's main telephone line and greets members of the public or others with business at the district office. In addition, the Receptionist monitors professional growth units, enters employee demographic data into the information system, assists with a credentials spreadsheet, maintains employee addresses needed for mailing information to district personnel, mails and logs applications, calls substitutes, and prepares work orders for first floor departments. The Receptionist has worked in various capacities with the district since 1997 and has been in this position for two years.

Many personnel offices in districts the size of Temple City Unified have a clerical support position. Establishing this position would allow the Assistant Superintendent, Personnel Technician and Personnel Assistant to spend additional time on other duties.

No cross training has occurred between these positions because of the current workload. Many employees have been with the district for many years and are capable of addressing immediate needs when another staff member is off duty. However, cross training would help ensure that the department could continue to function effectively during an unforeseen or prolonged absence.

The district Receptionist operates the telephone switchboard, serving all departments of the district office. Other district staff members utilize a rotating schedule to substitute for the Receptionist during morning and afternoon breaks and when the Receptionist is at lunch, ill or on vacation. Although this allows the district to cover the receptionist desk without hiring additional staff, the need to answer the telephone and assist the public diverts these employees from their normal work assignments.

Recommendations

The district should:

1. Consider the effect on workload of transferring certain duties to the existing staff after hiring a new Assistant Superintendent, and adjust full-time equivalent (FTE) levels accordingly.
2. Consider adding a half to one FTE position to the Personnel Department for clerical support and to provide coverage for the district Receptionist instead of using the rotating staff schedule.
3. Initiate cross training between all Personnel staff members as time permits, beginning with those in credentialing.

Determination of Functions

Different school districts assign responsibility for specific functions to different departments. For example, some districts place payroll functions in the business office while other districts assign this function to the personnel office. There is no standard rule on where these functions should reside. At Temple City Unified, most functions handled by the Personnel Services Department are typical of other districts. However, some districts assign to the Payroll Department the task of answering employee questions and concerns on health plan coverage, providers, and claims. The business office also calculates Golden Handshake savings.

Up to half an FTE is commonly assigned responsibility for all health benefit-related tasks, including providing employees with individual customer service, monitoring and updating employee eligibility, and reconciling monthly invoices for payment. The level of customer service provided in Temple City Unified is highly valued. However, redirecting employees with questions to the health plan providers or insurance companies would provide greater confidentiality and privacy regarding employee health/medical issues as required by the Health Insurance Portability and Accountability Act.

Recommendation

The district should:

1. Consider directing employees with questions on coverage and claims payment directly to the insurance provider or insurance administrator or assigning all health benefits tasks and employee support to a specific position.

Merit System Impact

The merit system requires the district Personnel Services Department to hire and recruit according to specific Education Code requirements. As a result, filling classified positions can be more time consuming than if the district was not under the merit system. Over the past three school years, the district has created an average of 20 eligibility lists with an average of 260 applicants per school year. While recruiting, screening, testing, interviewing and creating eligibility lists are time consuming, these tasks don't appear to have prompted a substantial increase in FTEs considering the average number of eligibility lists created annually.

Recommendations

The district should:

1. Assign merit system clerical duties to the proposed clerical support position to decrease the number of lower-level tasks completed by the Personnel Technician.
2. Include in the job posting pertinent information concerning testing and interview requirements for the positions. The postings should mention whether a typing test, written aptitude test, and/or initial ranking interviews will be required as part of screening.
3. Identify the dates for testing and interviews in advance, and include the information in the job posting whenever possible.
4. Include in the job posting health benefits information such as whether an advertised position includes full, prorated, or no benefits coverage.

Automation of Processes

The department staff compiles and tracks information either manually or on Excel spreadsheets for a variety of purposes. The spreadsheets maintain information on substitute teachers' education and credentials, substitute teachers' days worked, EL and CLAD information, employees requesting summer work, absences, performance evaluation due dates, classified and certificated seniority lists, annual vacation and sick leave accruals, summer school employment, job histories, credentials, certificated staff salary placement and college units, NCLB monitoring, and classified employee classification and status.

Responsibility for tracking employee absences and leave accrual is divided between the Personnel Department and the business office. Much of the tracking is performed manually and requires the use of time cards, time sheets, time reports and absence request forms.

The district lacks an effective position control system. The method of approving and creating new positions appears to be inconsistent and lacks internal controls. A personnel transaction request form has been created to aid in this process. However, the absence of an integrated and automated personnel system results in too many manual processes and duplication of information and effort.

A previous FCMAT report for the district indicates that the district Personnel and Payroll departments use the county office HRS system to manage the number of FTE staff.

Recommendations

The district should:

1. Discuss with the district technology staff the feasibility of developing a database application to manage the spreadsheet data. The district should also consider contracting with an outside consultant to convert the existing spreadsheet data to a database application if internal technology staff members are unable to perform this task.
2. Contact the Los Angeles County Office of Education to confirm what opportunities exist to maximize the use of the HRS system and prioritize time for staff training on HRS when possible. The initial focus should be on position control and absence tracking.
3. Work collaboratively with the business office to coordinate information on district staffing for budgetary purposes.

District Staffing Comparisons

Data was collected from districts similar to Temple City Unified to determine whether the department's existing staffing level is sufficient to maintain ongoing functions for district and personnel commission responsibilities following the hiring of a new Assistant Superintendent.

The comparative data on staffing from other school districts with similar student and financial characteristics was extracted from Ed-Data, a partnership of educational agencies. Ed-Data compiles its reports using fiscal, demographic, and student performance data collected by the California Department of Education. The sample districts in this review were confined to those with a Personnel Commission and a merit system for classified employees.

Districts are complex and may vary widely in demographics, resources and organizational structures. A critical evaluation is recommended when comparing school districts and their staffing in California. Generalizations based on one or two criteria can be misleading when significant circumstances are not taken into account and should not be misconstrued as creating a new standard.

FCMAT contacted six unified school districts to obtain staffing information as well as responses to nine questions on process and procedure. The responses to the following survey questions are followed by a table with comparative staffing information. Responses were received from four of the six districts contacted.

Bassett Unified School District – Los Angeles County

The district's Human Resources Department staffing includes an Assistant Superintendent, clerical support, an Administrative Secretary, and two HR specialists, classified and certificated. The district also has a personnel commission office separate from HR, which is staffed by a Personnel Director, Personnel Analyst, and an HR Technician.

Survey responses

1. Does your department work with employees when they have questions on H&W benefits and/or conduct new employee orientations on benefit coverage? If not, who does?
Response: The HR department does this.
2. Who in your district updates the collective bargaining agreement document after negotiations are completed?
Response: The HR department does this.

3. Who updates the salary schedules?
Response: The HR department does this.
4. Identify the impact of being a merit system district on staff time (how much time is needed for things as conducting tests, establishing lists, preparing for personnel commission meetings, etc.).
Response: Our personnel commission functions are handled from a separate office. They manage the PC functions full time.
5. Do you have an automated system(s) for absence tracking, TB tests, credential monitoring, position control, etc? If so, what system(s) do you use, or do you track these things manually with spreadsheets or databases?
Response: We use the county notifications to populate our manual tracking databases.
6. Is overtime a common occurrence in your department or normally necessary only at the beginning of the year?
Response: Overtime is rare in the HR and PC departments.
7. Is payroll part of personnel in your district?
Response: Payroll is not part of personnel. It is part of the business department.
8. Do you have an automated sub caller?
Response: We use an automated substitute system for certificated and classified.
9. Who covers the receptionist responsibilities if the receptionist is at lunch or not on duty?
Response: The receptionist is assigned to the superintendent's office. HR staff cover when superintendent's staff is not available.

Los Baños Unified School District – Merced County

The districts Human Resources Department staffing includes a Director, two personnel technicians – classified and certificated -- and 1.5 FTE for clerical support. The district also has a .5 FTE classified Personnel Director under the jurisdiction of the personnel commission.

Survey responses

1. Does your department work with employees when they have questions on H&W benefits and/or conduct new employee orientations on benefit coverage? If not, who does?
Response: Primarily business office although we work in conjunction with this office for leaves and FMLA,, etc

2. Who in your district updates the collective bargaining agreement document after negotiations are completed?

Response: HR Director

3. Who updates the salary schedules?

Response: HR Director

4. Identify the impact of being a merit system district on staff time (how much time is needed for things as conducting tests, establishing lists, preparing for personnel commission meetings, etc.).

Response: I don't see that as the impact. Having CSEA and a merit system creates more of an impact.

5. Do you have an automated system(s) for absence tracking, TB tests, credential monitoring, position control, etc? If so, what system(s) do you use, or do you track these things manually with spreadsheets or databases?

Response: Absences are tracked through the SEMS program, position control through QSS and credentials, etc., through EDRM.

6. Is overtime a common occurrence in your department or normally necessary only at the beginning of the year?

Response: No overtime unless approved by the Superintendent. This is a districtwide policy. There have been times for projects or CBEDS when we have requested and been granted overtime. The beginning of the year is not as busy as the recruiting season. We are a YRE district, so the entire year is just as busy.

7. Is payroll part of personnel in your district?

Response: Payroll is part of the business office.

8. Do you have an automated sub caller?

Response: Yes, SEMS.

9. Who covers the receptionist responsibilities if the receptionist is at lunch or not on duty?

Response: We have rotating duty with all of the secretaries and clerical staff at the district office.

San Lorenzo Unified School District – Alameda County

The districts Human Resources Department staffing includes an Assistant Superintendent, three personnel assistants – two classified and 1 certificated , a Personnel Technician responsible only for benefits, a Receptionist, a clerical support position mainly for posting and testing classified positions, a Secretary to the Assistant Superintendent, and a Credentials Analyst.

Survey responses

1. Does your department work with employees when they have questions on H&W benefits and/or conduct new employee orientations on benefit coverages? If not, who does?
Response: Yes
2. Who in your district updates the collective bargaining agreement document after negotiations are completed?
Response: The secretary to the assistant superintendent for certificated and the personnel assistant for classified
3. Who updates the salary schedules?
Response: The secretary
4. Identify the impact of being a merit system district on staff time (how much time is needed for things as conducting tests, establishing lists, preparing for personnel commission meetings, etc.).
Response: The merit system has a huge impact on time, record keeping and acquiring outside panelists for oral exams. Site administrators noted concerns with the tendency for slowing the process down.
5. Do you have an automated system(s) for absence tracking, TB tests, credential monitoring, position control, etc? If so, what system(s) do you use, or do you track these things manually with spreadsheets or databases?
Response: The district uses Sub Finder and tracks substitutes manually.
6. Is overtime a common occurrence in your department or normally necessary only at the beginning of the year?
Response: Overtime is not common, but happens mostly right before the start of school.
7. Is payroll part of personnel in your district?
Response: No
8. Do you have an automated sub caller?
Response: Yes

9. Who covers the receptionist responsibilities if the receptionist is at lunch or not on duty?

Response: Anyone/everyone in the personnel office

Castro Valley Unified School District – Alameda County

The district's Human Resources Department staffing includes an Assistant Superintendent, a Confidential Personnel Assistant that handles certificated employees, a Confidential Personnel Technician that handles classified employees, and clerical support that includes responsibility for substitutes.

1. Does your department work with employees when they have questions on H&W benefits and/or conduct new employee orientations on benefit coverage? If not, who does?

Response: Yes, in conjunction with payroll. We do the initial work and can handle most questions. More technical issues are referred to payroll.

2. Who in your district updates the collective bargaining agreement document after negotiations are completed?

Response: The assistant superintendent with clerical support for document clean up

3. Who updates the salary schedules?

Response: The assistant superintendent with clerical support for document clean up

4. Identify the impact of being a merit system district on staff time (how much time is needed for things as conducting tests, establishing lists, preparing for personnel commission meetings, etc.).

Response: The classified clerical/confidential does most of the paperwork, testing etc. The testing and commission meetings impact her time more than a nonmerit district.

5. Do you have an automated system(s) for absence tracking, TB tests, credential monitoring, position control, etc? If so, what system(s) do you use, or do you track these things manually with spreadsheets or databases?

Response: Not entirely. We use SEMS for absence tracking

6. Is overtime a common occurrence in your department or normally necessary only at the beginning of the year?

Response: During the certificated hiring season, the confidential staff that handles certificated hiring is busy. However, because she is confidential, she doesn't get hourly overtime.

7. Is payroll part of personnel in your district?

Response: No

8. Do you have an automated sub caller?

Response: Yes

9. Who covers the receptionist responsibilities if the receptionist is at lunch or not on duty?

Response: An account tech from the business office covers the receptionist.

Comparative Staffing Information

District Name	Temple City	Bassett	Los Baños	San Lorenzo	Castro Valley
County	Los Angeles	Los Angeles	Merced	Alameda	Alameda
2005-06 enrollment	5,709	5,659	8,768	11,613	8,629
Positions – FTE					
Assistant Superintendent	1	1		1	1
Director			1		
Personnel Assistant	1			3	1
Personnel Technician	1		2	1	1
Receptionist	1			1	
Clerical support		1		1	1
Other positions					
Admin Secretary		1			
HR Spec/Cert		1			
HR Spec/Class		1			
Typist Clerk			1.5		
Secretary II			.5		
Secretary					
Credentials Analyst				1	
Personnel Secretary				1	
Personnel Commission office/(FTE)	No	Yes (3 FTE)	Yes (.5 FTE)	No	No
Total	4 FTE	8 FTE	5.5 FTE	9 FTE	4 FTE

Staff Responses to FCMAT Questions

The study team solicited responses from Personnel Services Department staff members to validate the perceptions of the staff with the study team's conclusions. A summary of the responses are included with each of the five questions:

1. Do you consider your workload excessive? Are there any tasks that are not getting done or are not currently up to date because of the current workload? Are reporting deadlines missed?

Staff members reported that the workload is heavy and at times could be considered excessive. The ongoing interruptions necessary to maintain the district's priority of high customer service results in intermittent focus on ongoing responsibilities. While reporting deadlines are not missed, less important tasks may be set aside until time is available for handling them.

2. If you are not overtime exempt, how often is it necessary for you to request supervisor approval for overtime? How often do you work overtime without pay and for how long past the normal workday?

Two members of the staff are eligible for overtime, but do not request approval for overtime to complete tasks. However, these employees report they often stay later than the end of the regular workday to finish work and keep things in order.

3. All of you use Excel to maintain certain types of information for current employees, and in some cases retain that information on past employees. In the district previously, have any databases been used, such as Access, for this purpose; and if so was it successful? If your data could be converted into a database in a timely manner so that the information could be pulled out in multiple reporting formats, would it save time and reduce duplication of effort?

While staff members are open to the idea of automation, two concerns were mentioned. Integration with the county office system is a primary consideration, and the development and conversion to a database application would have to be completed by someone other than the personnel services staff. There is no time available for the staff to contribute to an automation conversion.

4. Hypothetically speaking, if a full-time position was added to the department, what tasks would be switched from your desk to the new employee's desk? How would you fill the time that you had previously devoted to those tasks?

Staff members indicated that adding a full-time position could alleviate some of the clerical tasks required as a merit system district, such as testing, preparing interview packets, and assisting employees in signing up for benefits. It would also help with photocopying and filing as well as allow for cross training between the existing positions.

The staff is concerned about the impact the transition to a new assistant superintendent will have on it. Depending on the experience of the new assistant superintendent, it is possible that tasks related to preparing correspondence, processing contract updates, and creating and maintaining additional spreadsheets will be transferred back to the staff. This could cause the staff to fall behind more frequently on other tasks.

5. If there was one change that would give you more time to do what has to be done, what would it be?

Staff members were unanimous in saying that the district should consider restoring the Personnel Technician Position, which was eliminated during budget cuts.

Appendix

A. Study Agreement

TC067093
BOARD APPROVED 11/15/06

FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM
STUDY AGREEMENT
October 25, 2006

The FISCAL CRISIS AND MANAGEMENT ASSISTANCE TEAM (FCMAT), hereinafter referred to as the Team, and the Temple City Unified 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 Temple City Unified 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.

2. SCOPE OF THE WORK

A. Scope and Objectives of the Study

The scope and objectives of this study are to:

- 1) Conduct an organizational review of the District's Personnel Office to analyze the following factors:
 - a. Distribution of workload
 - b. Determination of functions that generally fall under other departments in other school districts
 - c. Impact of responsibilities required as a merit system district
 - d. Automation of employee and applicant information collection and retention
 - e. Staffing comparisons of like sized unified merit system districts

B. Services and Products to be Provided

- 1) 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.
- 2) On-site Review - The Team will conduct an on-site review at the District office and at school sites if necessary.
- 3) Progress Reports - 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.
- 4) 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.

- 5) Draft Reports - Sufficient copies of a preliminary draft report will be delivered to the District administration for review and comment.
- 6) Final Report - Sufficient copies of the final study report will be delivered to the District following completion of the review.

3. PROJECT PERSONNEL

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

- A. FCMAT Fiscal Intervention Specialist or Management Analyst
- B. FCMAT Personnel 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. Based on the elements noted in section 2 A, the total cost of the study is estimated at \$4,000. 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
- 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:
 - 1) A map of the local area
 - 2) Existing policies, regulations and prior reports addressing the study request
 - 3) Current organizational chart of the District's Personnel Office
 - 4) Personnel Office job descriptions
 - 5) Information on District's Personnel Commission operations, roles, and

- responsibilities assigned to Personnel Office staff, if any
- 6) Personnel Office employee listing of normal duties on a daily, monthly, and annual basis
- 7) Information, including sample documents, of current process for employee and new applicant intake information and file retention
- 8) Information on level of overtime required
- 9) Identification of functions that could be transferred to other departments
- 10) Other items, as requested

- 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 District pupils. The District shall take appropriate steps to comply with EC 45125.1(c).

6. PROJECT SCHEDULE

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

Orientation:	Estimated December 2006 or January 2007
Staff Interviews:	To be determined
Exit Interviews:	To be determined
Preliminary Report Submitted:	To be determined
Final Report Submitted:	To be determined
Board Presentation:	To be determined

7. CONTACT PERSON

Please print name of contact person:

Beverly Jones, Assistant Superintendent Personnel

Telephone 626 548-5004

FAX 626 548-5011

Internet Address bjones@tcusd.net


 David Jaynes, Chief Business Official
 Temple City Unified School District

11/16/06

Date


 Barbara Dean, Deputy Administrative Officer
 Fiscal Crisis and Management Assistance Team

Oct 25, 2005

Date

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.

