

**San Dieguito Union High School District  
PERSONNEL COMMISSION**

**Regular Meeting Agenda**

4:00 P.M., June 9, 2015  
710 Encinitas Boulevard, Encinitas, CA 92024  
District Office Board Room 101

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**PUBLIC COMMENTS**

If you wish to speak regarding an item on the agenda, please complete a "Request to Address the Personnel Commission" slip located at the sign-in table and present it to Personnel Commission staff prior to the start of the meeting. When the Personnel Commission Chair invites you to speak, please state your name, address, and the name of your organization before making your presentation. In the interest of time and order, presentations from the public should be focused and on topic. The Commission Chair will curtail public comments that become repetitive, unfocused or off topic.

Persons wishing to address the Personnel Commission on any Commission-related issue not elsewhere on the agenda are invited to do so when the Commission calls for "Public Comments" under that item of the agenda. Please follow the same directions (above) for speaking to agenda items. Complaints or charges against an employee are not permitted in an open meeting of the Personnel Commission. Instead, such matters should be provided in writing to the Commission through the Classified Personnel Office.

**AGENDA POSTING REQUIREMENTS:**

In accordance with the Brown Act and Personnel Commission Rules, agenda for Regular Personnel Commission Meetings will be posted at least 72 hours prior to the meeting. Agendas for Special Meetings will be posted at least 24 hours prior to the meeting.

**PUBLIC INSPECTION OF DOCUMENTS**

A copy of this agenda with all the supporting documents is available for review in the Classified Personnel Office between 8:00 AM and 4:30 PM, and is available on the district website, [www.sduhsd.net](http://www.sduhsd.net). In addition, a copy of the Personnel Commission Rules and Regulations may also be found on the district website.

**CELL PHONES/ELECTRONIC DEVICES**

As a courtesy to all attendees, please silence all electronic devices to silent mode and engage in conversations outside the meeting room.

In compliance with the Americans with Disabilities Act, if you need special assistance, disability-related modifications, or accommodations including auxiliary aids or services, in order to participate in the public meetings of the Personnel Commission, please contact the Classified Personnel Office at (760) 753-6491. Notification 72 hours prior to the meeting will enable staff to make reasonable arrangements to ensure accommodation and accessibility to this meeting. Upon request, the Commission shall also make available this agenda and all other public records associated with the meeting in appropriate alternative formats for the persons with a disability.

**San Dieguito Union High School District  
PERSONNEL COMMISSION**

**Regular Meeting Agenda**

4:00 P.M., June 9, 2015  
710 Encinitas Boulevard, Encinitas, CA 92024  
District Office Board Room 101

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**REGULAR MEETING/OPEN SESSION**

1. CALL TO ORDER ..... Commission Chairperson
2. PLEDGE OF ALLEGIANCE
3. Approval of the Agenda for the June 9, 2015, Personnel Commission Regular Meeting.  
  
Motion by \_\_\_\_\_, second by \_\_\_\_\_, to approve the agenda for the June 9, 2015, Personnel Commission Regular Meeting.
4. Approval of the Minutes for the May 5, 2015, Personnel Commission Regular Meeting.  
  
Motion by \_\_\_\_\_, second by \_\_\_\_\_, to approve the minutes for the May 5, 2015, Personnel Commission Regular Meeting.

**ACTION ITEMS (See Supplements)**

5. ELIGIBILITY LISTS TO BE ESTABLISHED
  - A. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to establish an Eligibility List for ADMINISTRATIVE SECRETARY, SR-40, Open/Promotional, six months eligibility.
  - B. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to establish an Eligibility List for HUMAN RESOURCES TECHNICIAN, SR-42, Open/Promotional-Dual Certification, six months eligibility.
6. ELIGIBILITY LISTS TO BE APPROVED
  - A. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve an Eligibility List for CUSTODIAN FLOATER, SR-33, Open/Promotional-Dual Certification, six months eligibility, from 5/07/15.
  - B. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve an Eligibility List for SCHOOL PLANT SUPERVISOR-MIDDLE SCHOOL, SR-39, Promotional, six months eligibility, from 5/14/15.
  - C. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve an Eligibility List for ACCOUNTING ASSISTANT, SR-40, Open/Promotional-Dual Certification, six months eligibility, from 5/22/15.

- D. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve an Eligibility List for CUSTODIAN, SR-32, Open/Promotional-Dual Certification, six months eligibility, from 6/03/15.

7. APPROVAL OF CLASS DESCRIPTION REVISIONS

A. Learning Commons Technician

- a. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve class description revisions for the Learning Commons Technician classification as shown in the attached supplements.
- b. Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to establish an Eligibility List for Learning Commons Technician, SR-40, Open/Promotional-Dual Certification, six months eligibility.

B. Risk Management Technician

Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve class description revisions for the Risk Management Technician classification as shown in the attached supplements.

C. Human Resources Technician

Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve class description revisions for the Human Resources Technician classification as shown in the attached supplements.

8. APPROVAL OF ANNUAL MEMBERSHIPS AND SERVICE AGREEMENTS

Motion by \_\_\_\_\_, seconded by \_\_\_\_\_, to approve the renewal of annual memberships and service agreements for the 2015/16 fiscal year as shown in the attached supplements.

**DISCUSSION/INFORMATION ITEMS (See Supplements)**

9. PERSONNEL COMMISSION RULES – Rule 4.9

This item has been placed on the agenda for discussion at the request of Mr. Scott Hendries, Labor Relations Representative for CSEA.

10. PERSONNEL COMMISSION RULES – Rule 2.15.C

This item has been placed on the agenda for discussion by the Personnel Commission. Rule 2.15.C is included in the attached supplements.

11. PERSONNEL COMMISSION RULES – CHAPTER 3

A revised draft proposal for revisions to Chapter 3 has been submitted for additional discussion.

12. STAFF COMMENTS ON PERSONNEL ACTIVITIES

- A. Vacancy Report
- B. Employment Listing

13. CORRESPONDENCE

Letter from San Diego County Office of Education – Approval of the 2015/16 Personnel Commission Budget

14. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised during public comments except to 1) acknowledge receipt of the information, 2) refer it to staff for further study, or 3) refer the matter to the next agenda.

- A. California School Employees Association
- B. San Dieguito Union High School District
- C. Public Comments

15. CLOSED SESSION

Closed session to consider personnel issues pursuant to Government Code Sections 11126 and 54957 (for consideration of litigation, the appointment, employment, evaluation for performance, discipline/release, dismissal of a public employee or to hear complaints or charges brought against such employee by another person or employee unless the employee requests a public session).

- A. Evaluation of the Director

16. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission is scheduled for Tuesday, July 14, 2015, at 4:00 P.M. in the District Office Large Board Room 101, 710 Encinitas Boulevard, Encinitas, CA 92024.

17. ADJOURNMENT

**San Dieguito Union High School District  
PERSONNEL COMMISSION**

**Regular Meeting Minutes**

4:00 P.M., May 5, 2015  
710 Encinitas Boulevard, Encinitas, CA 92024  
District Office Board Room 101

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**REGULAR MEETING/OPEN SESSION**

1. Call to Order  
The meeting was called to order at 4:03 P.M. by David Holmerud, Commission Chair.
2. Pledge of Allegiance  
The pledge of allegiance was led by Commissioner Holmerud.

Members in Attendance

John Baird  
David Holmerud  
Terry King

Staff in Attendance

Corrie Amador, Director  
Barbara Bass, Human Resources Analyst  
Kathy Potter, Human Resources Technician

Guests

Carmen Blum	Dan Love
Debbie Davidson	Tina Peterson
Scott Hendries	Rosie Prine
Laura Hernandez	Adrienne St. George
Debbie Johnson	Jason Vilorio

3. Approval of the Agenda for the May 5, 2015, Personnel Commission Regular Meeting.  
Motion by JOHN BAIRD, second by TERRY KING, to approve the agenda for the May 5, 2015, Personnel Commission Regular Meeting.  
*Passed unanimously.*
4. Approval of the Minutes for the April 14, 2015, Personnel Commission Special Meeting.  
Motion by TERRY KING, second by JOHN BAIRD, to approve the minutes for the April 14, 2015, Personnel Commission Meeting.  
*Passed unanimously.*

**ACTION ITEMS**

5. ELIGIBILITY LISTS TO BE ESTABLISHED
  - A. Motion by JOHN BAIRD, seconded by TERRY KING, to establish an Eligibility List for CUSTODIAN, SR-32, Open/Promotional-Dual Certification, six months eligibility.  
*Passed unanimously.*

- B. Motion by TERRY KING, seconded by JOHN BAIRD, to establish an Eligibility List for ACCOUNTING ASSISTANT, SR-40, Open/Promotional-Dual Certification, six months eligibility.  
*Passed unanimously.*
- C. Motion by JOHN BAIRD, seconded by TERRY KING, to establish an Eligibility List for ADMINISTRATIVE SECRETARY-MIDDLE SCHOOL, SR-38, Open/Promotional, six months eligibility.  
*Passed unanimously.*
- D. Motion by TERRY KING, seconded by JOHN BAIRD, to establish an Eligibility List for NUTRITION SERVICES ASSISTANT I, SR-25, Open/Promotional-Dual Certification, six months eligibility.  
*Passed unanimously.*
- E. Motion by JOHN BAIRD, seconded by TERRY KING, to establish an Eligibility List for SCHOOL PLANT SUPERVISOR-MIDDLE SCHOOL, SR-39, Promotional, six months eligibility.  
*Passed unanimously.*

6. ELIGIBILITY LISTS TO BE APPROVED

- A. Motion by TERRY KING, second by JOHN BAIRD, to approve an Eligibility List for GROUNDS MAINTENANCE WORKER II, SR-39, Promotional, six months eligibility from 4/15/15.  
*Passed unanimously.*
- B. Motion by JOHN BAIRD, second by TERRY KING, to approve an Eligibility List for GROUNDS MAINTENANCE WORKER/APPLICATOR, SR-40, Open/Promotional, six months eligibility from 4/15/15.  
*Passed unanimously.*
- C. Motion by TERRY KING, second by JOHN BAIRD, to approve an Eligibility List for ADMINISTRATIVE ASSISTANT-HIGH SCHOOL, SR-44, Open/Promotional, six months eligibility from 4/17/15.  
*Passed unanimously.*
- D. Motion by JOHN BAIRD, second by TERRY KING, to approve an Eligibility List for INSTRUCTIONAL ASSISTANT SPECIAL EDUCATION (NON-SEVERE), SR-34, Open/Promotional-Dual Certification, six months eligibility from 4/23/15.  
*Passed unanimously.*

**CLASSIFICATION (See Supplements)**

7. APPROVAL OF CLASS DESCRIPTION REVISIONS

- A. Lead Library/Media Technician
  - 1. Motion by TERRY KING, seconded by JOHN BAIRD, to approve a title change from Lead Library/Media Technician to Learning Commons Technician.  
*Passed unanimously.*
  - 2. Motion by JOHN BAIRD, seconded by TERRY KING, to approve class description revisions for the Learning Commons Technician classification as shown in the attached supplements.  
*Passed to TABLE to June 9, 2015 meeting.*

B. Risk Management Technician

Motion by TERRY KING, seconded by JOHN BAIRD, to approve class description revisions for the Risk Management Technician classification as shown in the attached supplements.

*Passed to TABLE to June 9, 2015 meeting.*

C. Human Resources Technician

Motion by JOHN BAIRD, seconded by TERRY KING, to approve class description revisions for the Human Resources Technician classification as shown in the attached supplements, with agreement to review the Working Conditions section of the description at the June 9, 2015 meeting.

*Passed unanimously.*

*Items D through G. Passed to TABLE for further review.*

D. Grounds Maintenance Worker I

E. Grounds Maintenance Worker II

F. Nutrition Services Transporter I

G. Nutrition Services Transporter II

8. APPROVAL OF PROPOSED PERSONNEL COMMISSION 2015-16 BUDGET

A. Open Public Hearing

B. Call for Public Comment

C. Close Public Hearing

D. Approval of 2015-16 Proposed Personnel Commission Budget

Motion by JOHN BAIRD, seconded by TERRY KING, that the 2015-16 Personnel Commission Budget be approved as proposed.

*Passed unanimously.*

9. ADOPTION OF REVISED PERSONNEL COMMISSION RULES

A. CHAPTER 2

A revised draft for revisions to Chapter 2 was submitted for adoption.

Motion by TERRY KING, seconded by JOHN BAIRD, that the revisions to Chapter 2 of the Personnel Commission Rules be adopted as proposed.

Following discussion, the Commissioners agreed to strike the following statement from Rule 2.15.B:

“The Personnel Director may be designated as a hearing officer in accordance with the Education Code.”

*Passed unanimously.*

B. RULE 6.1

A draft for revision to Rule 6.1 was submitted for adoption.

Motion by JOHN BAIRD, seconded by TERRY KING, that the revision to Rule 6.1 of the Personnel Commission Rules be adopted as proposed.

*Passed unanimously.*

**DISCUSSION/INFORMATION ITEMS (See Supplements)**

10. PERSONNEL COMMISSION RULES – CHAPTER 3

A revised draft proposal for revisions to Chapter 3 was submitted for additional discussion. Due to the late hour, the Commissioners agreed to discuss this item at the June 9 meeting.

11. STAFF COMMENTS ON PERSONNEL ACTIVITIES

A. Vacancy Report- Director Amador cited that a significant number of employees have promoted to new positions during a very busy recruitment time. Commissioner Holmerud mentioned how much he enjoyed the visit he and Director Amador made to observe the Grounds-South crew as they began their day.

B. Employment Listing

12. CORRESPONDENCE

Thank you letter from Director Amador to Chief Umbel for use of their facility

13. PUBLIC COMMENTS

The Public Comments Section of the meeting provides the opportunity for individuals to address items that are not on the agenda. In accordance with the Brown Act, Personnel Commissioners may not engage in a discussion of non-agenda items or issues raised during public comments except to 1) acknowledge receipt of the information, 2) refer to staff for further study, or 3) refer the matter to the next agenda.

A. California School Employees Association – None

B. San Dieguito Union High School District – None

C. Public Comment

Ms. Laura Hernandez addressed the Commission regarding the testing and appeal process. The Commission referred the matter to staff for further study.

Commissioner Baird requested Rule 2.15.C be added to the June 9 meeting for further discussion.

14. NEXT PERSONNEL COMMISSION MEETING

The next regular meeting of the Personnel Commission was scheduled for Tuesday, June 9, 2015, at 4:00 PM in the District Office Large Board Room 101, 710 Encinitas Boulevard, Encinitas, CA 92024.

16. ADJOURNMENT Personnel Commission meeting adjourned at 6:50 P.M.



San Dieguito Union High School District  
Personnel Commission  
Eligibility List  
Open/Promotional-Dual Certification

Effective: 5-07-15  
Expiration: 11-07-15

Custodian Floater

Promo

Rank	Applicant ID#
1	2048429
2	1768117
2	2829729
3	2826369
4	2828080

**San Dieguito Union High School District  
Personnel Commission  
Eligibility List  
Promotional**

**School Plant Supervisor-Middle School**

**Effective: 05/14/15  
Expiration: 11/14/15**

<b>Rank</b>	<b>Applicant ID</b>
1	16016024
2	15975306
3	15967621
4	16022462
5	16021581

San Dieguito Union High School District  
Personnel Commission  
Eligibility List  
Open/Promotional - Dual Certification

Effective: 05/22/15  
Expiration: 11/22/15

Accounting Assistant

Promo

Rank	Applicant ID
1	2714693
2	2521871
3	1136227
4	2828541
4	2579693
4	2832011
4	2694743
5	2461757
6	2828769

San Dieguito Union High School District  
Personnel Commission  
Eligibility List  
Open/Promotional -- Dual Certification

Effective: 06/03/15  
Expiration: 12/03/15

Custodian

Open

Rank	Applicant ID
1	2636812
1	2761292
1	1464085
2	2213512
3	2822487
4	1934198
4	2738893
5	2229741
6	2836020
7	2818811
8	2833933
9	2834971
10	2846046
11	2822545
11	2845793
12	1413417

Internal Candidates are indicated by "promo."

## Classification Review Report

Classification	Learning Commons Technician (previously Lead Library/Media Technician)
Classification Type	Classified
Salary Range	40
Submission to Classification Advisory Committee	4/23/15; 5/28/15
Submission to Personnel Commission	5/5/15; 6/9/15
Agenda Item	Classification Revisions #7A

*This item was tabled at the May 5, 2015 Personnel Commission meeting for further research and discussion with the Classification Advisory Committee regarding the Working Environment section. This report now includes a specific recommendation for the Working Environment section.*

### Background Information

In preparation for an upcoming retirement in the classification, Personnel Commission staff has reviewed the Lead Library/Media Technician description. The description was last updated for content in July 2007 and is in need of revision prior to recruitment.

First, as part of the bond work, the Library/Media Centers are being upgraded to create spaces that are more conducive to student learning. The centers have been redesigned with less book shelves and heavy, static furniture, and are now more open to encourage students to meet and engage in collaborative academic activities for whole classrooms or small groups. The facility redesign mirrors changes occurring at the university level such as CSU San Marcos, Cuesta, and San Jose. In following the universities' lead, the District has decided to rename the Library/Media Centers, the Learning Commons. In response to this change, the draft proposed replaces all references to Library Media Center with Learning Commons. It is also recommended the title Lead Library/Media Technician be retitled to Learning Commons Technician.

The second focus is the evolution of student and staff access to technology such as eBooks in addition to print books. Students are now able to access thousands of titles through Overdrive, an on-line collection of digital books made available to our students. The Technicians are still responsible for ordering, receiving, and displaying print materials for student use, however, this function has decreased as there has been a significant shift towards eBooks access. The proposed draft further recognizes the changes in technology used in the Learning Commons and removes antiquated wording such as the broadcast media system (Dynacom). The Technicians have always

assisted students and staff with using a variety of software and electronic devices in the Learning Commons, which includes multimedia and computing peripherals (Chrome books, printers, projectors, etc.). Staff receives training from the District Library/Media Coordinator in the four job-alike meetings scheduled each year as well as updates through the District’s TOSA for Technology and Learning and training through the San Diego County Office of Education.

In addition, the Working Environment section of the description has been updated to align with standards recommended by the JPA of San Diego County Office of Education. *(See additional information below.)*

**Salary Compensation Review**

District	Salary Range	Job Title	Minimum	Maximum
Carlsbad	19	Library Media Technician	\$35,006	\$49,254
Sweetwater UHSD	50	Library Media Technician	\$38,508	\$47,376
Grossmont UHSD	40	Library Technician	\$36,562	\$46,384
San Marcos USD	45	Library Media Technician III	\$35,844	\$45,696
Vista USD	47	Library Media Technician II-MS/HS	\$34,786	\$44,529
Escondido UHSD	25	Library Media Technician	\$32,718	\$43,826
Oceanside USD	21	Library Media Technician	\$34,427	\$43,697
Poway USD	24	Library Media Technician – Secondary	\$31,908	\$38,868
Poway USD	24	Library Media Computer Resource Technician	\$31,908	\$38,868
Ramona USD	18	Library Technician	\$27,144	\$34,757
<b>Average</b>			<b>\$33,881</b>	<b>\$43,325</b>

SDUHSD	40	Learning Commons Technician (previously Lead Library/Media Technician)	\$38,638	\$49,225
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Note: Mira Costa Community College was not included. They utilize the Library of Congress system, and positions range from Library Tech I-III, Public Services and Technical Services (starting salary \$50K); Media Services Tech Specialist and Aide (starting salary \$43K).

**Sources of Information**

Initial interviews with 4 Lead Library/Media Technicians with follow up solicitation of input from all Technicians  
*Working Environment Job Analysis at Oak Crest Middle School and La Costa Canyon High School*  
 District Library/Media Coordinator  
 Executive Director of Educational Services  
 Joint Powers Authority, San Diego County Office of Education  
 Ms. Judy Lemm, Disability Management Consultant for the Joint Powers Authority  
 Comparable Districts in San Diego County, San Diego County Office of Education, Mira Costa Community College

**Recommendation**

The Personnel Commission approved the change in title to Learning Commons Technician at its regular meeting on May 5, 2015. It is recommended the revisions to the description be approved. There is no recommendation for salary reallocation.

**Vote by Committee Members 4/23/15:**

<b>Vote</b>	<b>Member</b>	<b>Vote</b>	<b>Member</b>
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Yes	Matt Colwell, CSEA	Yes	Rick Mariam, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

**Working Environment Section:**

Formal job analysis was conducted through site visits and interviewing one Technician at a middle school and one at a high school. Items in the learning commons were measured, and each task was analyzed for its physical aspects. The job analysis report was provided to the Classification Advisory Committee in support of the Working Environment section revisions. After discussion, the committee voted unanimously to approve the recommended working environment language.

**Vote by Committee Members regarding recommendation for revised Working Conditions section:**

<b>Vote</b>	<b>Member</b>	<b>Vote</b>	<b>Member</b>
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Yes	Matt Colwell, CSEA	Yes	Rick Mariam, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

**LEARNING COMMONS TECHNICIAN****LEAD LIBRARY MEDIA TECHNICIAN****OVERALL JOB PURPOSE STATEMENT**

Under the direction of a site administrator and/or the technical review of ~~an assigned~~ the District Library/Media ~~Specialist~~ Coordinator, the job of ~~Lead Library Media~~ a Learning Commons Technician is ~~done for the purposes of~~ coordinating the work at a site ~~Library/Media Center~~ Learning Commons, performing a variety of complex technical and clerical ~~services and~~ duties in support of the acquisition, processing, cataloging, use, maintenance, circulation and record-keeping associated with ~~print and digital~~ materials in the ~~Library/Media Center~~ Learning Commons; assisting with the operation and support of ~~a broadcast media system~~ electronic media and devices, maintaining library and media collections including processing ~~and cataloging~~ acquisitions ~~and cataloging materials~~; and providing guidance and direction to assist students and teachers in utilizing ~~library~~ learning commons resources.

**DISTINGUISHING CHARACTERISTICS**

This job is distinguished from similar jobs by the following characteristics: the ~~Library Media~~ Learning Commons Technician series is responsible for the ~~proper cataloging and listing processing~~ of new items, ~~including and~~ searching for appropriate ~~standard~~ resource materials to ~~obtain necessary~~ locate relevant and current information, ~~directly assisting and guiding students and staff~~, and monitoring and maintaining electronic devices. Incumbents must be knowledgeable ~~both~~ about ~~items~~ available resources, ~~in the center, including computer based and other electronic media and references (e.g. CD's, DVD's, etc.), and relevant sites on the world wide web in order to assist students and teachers to identify and locate from the collection or from the Internet~~ and appropriate materials to support educational activities, ~~and be able to support the center's broadcast media system.~~ such as the Internet, online databases, eBook access, various software and applications, and electronic media in order to assist students and teachers to identify and locate appropriate materials to support educational learning activities. The class of ~~Lead Library Media~~ Learning Commons Technician ~~is assigned to a site that does not have a full-time Library/Media Specialist on staff and therefore the position~~ functions with greater independence and has ~~more~~ full responsibility for work coordination, and oversight of program functions and leadership in ensuring students ~~and staff~~ understand and use the collection and databases effectively to undertake research ~~than is required of the related class of Library Media Technician.~~

**ESSENTIAL FUNCTIONS**

- Coordinates and organizes the functions and tasks of a site ~~Library/Media Center~~ Learning Commons in support of the site's overall educational program as directed by a site administrator ~~and the District Library Media Coordinator.~~
- Coordinates with ~~District Library Media Coordinator~~, site administrators and department chairs for requisitioning educational materials designated for addition to the site's collection.
- Communicates with District personnel ~~and outside agencies~~ to exchange information, to ~~assist in coordinate activities, and to resolving~~ resolve issues or concerns related to ~~library~~ learning commons activities, purchase orders, instructional support materials, and equipment usage.



**LEARNING COMMONS TECHNICIAN**

- ~~Plans and organizes displays and other~~ Supports activities which ~~to~~ raise student and staff awareness, engagement ~~of~~ and use of the ~~Library/Media Center Learning Commons~~ resources, such as maintaining and updating the website, promoting learning opportunity programs (i.e tutoring, student academic partnerships, etc.) and other engagement initiatives.
- ~~Updates library/media center's information on school site's web pages to support students' use of the facility and collection.~~
- ~~Operates, programs and modifies the closed-circuit broadcast and DynaCom systems assigned for the purpose of maintaining scheduled programming.~~
- Identifies/corrects minor technical problems and user operation errors for the purpose of reestablishing system reliability.
- Provides guidance and direction to students and staff regarding available resource materials, how to source materials, and how to operate various equipment and electronic devices.
- ~~Orients and guides users in correct operation of library resources including computers and research databases and other software for the purpose of minimizing user operation errors and system downtime.~~
- ~~Assists teachers, students, and other personnel for the purpose of identifying and locating resources materials for use in classroom and/or class assignments.~~
- Demonstrates media systems and equipment (e.g. classification system, on-line catalogs, subject-specific web sites on the internet, care of materials, etc.) to students for the purpose of educating them on the proper use of the ~~library~~ learning commons resources.
- Directs activities of student ~~library~~ aides and parent volunteers for the purpose of orienting them and monitoring their adherence to ~~library~~ learning commons procedures and ~~circulation~~ tasks.
- Distributes various ~~books and media~~ resources and materials for the purpose of providing requested classroom reference materials.
- Inventories equipment and materials in ~~library~~ learning commons collection and monitors levels for the purpose of documenting losses and/or maintaining availability of materials and adequate quantities for operations.
- ~~Monitors inventory levels of textbooks, instructional materials, and other Library/Media Center supplies and items for the purpose of ordering/reordering to maintain adequate quantities for operations.~~
- Monitors student behavior and ~~computer~~ usage of digital devices in the ~~media center~~ learning commons for the purpose of enforcing standards that contribute to the use of the facility in accordance with ~~the media center~~ policies and practices.

**LEARNING COMMONS TECHNICIAN**

- Performs circulation activities (e.g. item check-in and check-out, prepare circulation count, lists of overdue items) for the purpose of controlling the use, location and availability of items in the collection.
- Prepares ~~library/media center~~ files, lists and records for the purpose of keeping information current and relevant to patron requests.
- ~~Prepares~~ Assists the District Library Media Coordinator by preparing information for reports for the purpose of providing statistical and operational information.
- ~~Coordinates the processing of requisitions (e.g. books, periodicals, films, invoice verification, etc.) for the purpose of ordering, receiving and inventorying new print and non-print items for the collection.~~
- Assists students in researching availability of materials and media for the purpose of selecting appropriate items for assigned projects.
- Coordinates and participates in cataloging and processing library materials using appropriate software for the purpose of integrating new materials into the collection. In collaboration with the District Library Media Coordinator, ensures that materials ordered are age appropriate, conducting research as needed.
- Ensures accuracy and currency of collection catalogs and ~~information databases~~ resources to provide maximum benefit to students.
- Schedules and distributes ~~audio-visual, television, computers and other~~ electronic and media-related equipment and materials for the purpose of ensuring the effectiveness of media programs and services.
- Ensures repair or replacement of damaged materials and/or equipment to maintain operational readiness of the ~~library/media center~~ learning commons. Calculates and collects fees for lost items.
- Attends meetings and workshops and engages in other forms of professional development to increase knowledge of the field and to keep current with the evolving delivery systems that provide access to information and the resources available to students and staff.
- Assists in the performance of other job related duties as assigned.

**JOB REQUIREMENTS: MINIMUM QUALIFICATIONS****~~SKILLS~~, KNOWLEDGE, SKILLS AND ABILITIES**

**SKILLS** are required to perform multiple, non-technical tasks with a need to periodically upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating/troubleshooting/training others to use a variety of office, electronic devices and multimedia equipment including ~~computers~~, related applications; the Internet and associated tools.

**LEARNING COMMONS TECHNICIAN**

~~typewriters, calculators, copiers, microfiche reader/printer, audio-visual equipment, laminating presses, book charger, spine labelers and binders.~~

**KNOWLEDGE** is required to perform basic math; read a variety of manuals, write documents following prescribed formats, and/or present information to others; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: technical library processes related to the acquisition and classification of materials; library terminology and standard practices; **software related to digital collections**; Internet sites relevant to the ~~media center~~ collection and activities; ~~Dewey Decimal classification system~~; standard ~~library~~ reference sources; popular, **current literary trends, Young Adult literature**, and classical ~~books literature~~ and their authors; ~~operation, use and programming of broadcast media system~~; correct English usage, grammar, spelling, punctuation and vocabulary; ~~operation of a computer terminal and library-specific hardware and software~~ operation and use of office equipment, computer software, hardware and associated applications, the Internet and associated tools and electronic media devices; **effective research strategies and available resources**; and record-keeping techniques; work coordination and priority in a ~~library/media center~~ **Learning Commons**.

**ABILITY** is required to schedule activities and/or meetings **to ensure maximum use of the facility**; gather, collate, and/or classify data; ~~and use basic, job-related equipment~~. Flexibility is required to independently work with others in a wide variety of circumstances, **under pressure and with frequent interruptions**; work with data utilizing specific, defined processes; work with similar types of data; and operate equipment using standardized methods. Ability is also required to work with ~~a diversity of diverse~~ individuals and/or groups. In working with others, independent problem solving is required to **provide customer service**, analyze issues, assign and coordinate work activities, and create action plans. Problem solving with data **and people** may require independent interpretation; and problem solving with equipment is limited to moderate. Specific abilities required to satisfactorily perform the functions of the job include the ability to perform a variety of technical ~~library~~ duties related to the cataloging and processing of print and non-print library materials; perform complex clerical work with speed and accuracy; catalog ~~library~~ materials according to established rules and regulations; ~~perform searches of internet sites to catalog items and to guide~~; **adapt easily and readily to new technologies, keep current with trends in instructional technology and the application of new information technologies**; direct, and assist students and staff with their information needs; **address student behavior issues**; train and provide work direction to others; perform reference and research work; ~~operate, maintain and provide instructions on the use of site broadcast media system~~; understand and follow oral directions; establish and maintain effective working relationships with others; work cooperatively with others; maintain records; and communicate effectively both orally and in writing.

**RESPONSIBILITY**

Responsibilities include: working under limited supervision following standardized practices and/or methods; leading, guiding, and/or coordinating others; operating within a defined budget. Utilization of some resources from other work units may be required to perform the job's functions. There is a continual opportunity to impact the organization's services.

**LEARNING COMMONS TECHNICIAN**

**WORKING ENVIRONMENT**

The usual and customary methods of performing the job's functions require the following physical demands: occasional lifting, carrying, pushing, and/or pulling; frequent stooping, kneeling, crouching, and/or crawling; and significant fine finger dexterity. Generally the job requires 20% sitting, 45% walking and 35% standing. The job is performed under minimal temperature variations, in a generally hazard free environment, and in varying atmospheric conditions.

The usual and customary methods of performing the job's functions requires working in a learning commons environment which is a large space or another district site to conduct work. The job functions require the following physical demands:

Physical Demands Frequency Definitions Based on an 8-Hour Day:

- Seldom = 1-10% (<45 minutes)
- Occasionally = 11-33% (up to 3 hours)
- Frequently = 34-66% (up to 6 hours)
- Continuously = 67-100% (more than 6 hours)

Seldom or Occasionally	Lifting and carrying more than 50 pounds with/without assistance at waist height up to 10 feet; sitting up to 15 minutes
Occasionally	Stooping/bending, squatting/crouching, twisting back, hand controls, shelving books, climbing, balancing, neck flexation/rotation, fingering/fine manipulation, power/firm grasping, reach at, above and below shoulder height
Occasionally or Frequently	Pushing/pulling carts, tables, chairs; lifting and carrying up to 50 pounds with/without assistance at waist height up to 25 feet, handling/simple grasping
Frequently or Continuously	Intervals: walking up to 30 minutes, standing up to 20 minutes

**AUDITORY OR VISUAL REQUIREMENTS**

Auditory ability to hear others in order to communicate and make presentations. Vision ability to see near, distant, depth and peripherally

**ENVIRONMENTAL CONDITIONS**

There is the potential for exposure to dust on shelves/books; uses a ladder or step stool to reach for objects.

**EXPERIENCE**

Job related experience is required, typically a At least two years of experience performing complex clerical and technical duties in a library/media center/learning commons operation, including circulation and cataloging of collection items and assisting users with their research requests and use of other library print and electronic resources. Experience in a school library, media center, learning and/or information commons is highly preferred.

**EDUCATION**

High School diploma or equivalent, supplemented by courses in library technology. An Associate of Arts, or a Certificate of Completion of a course of study, in Library Technology is preferred. Additional

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**LEARNING COMMONS TECHNICIAN**

qualifying experience demonstrating the required knowledge, skills and abilities to perform the job may be substituted for the preferred education.

**REQUIRED TESTING**

~~Pre-employment Proficiency Test~~ Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

**CERTIFICATES/LICENSES**

California Class C ~~driver's~~ **Driver's license** ~~License~~ **required**. Position is ~~required~~ occasionally **required** to travel to the District Office, other school sites, or the County Office of Education in order to attend meetings, seminars and other training.

**CONTINUING EDUCATION/TRAINING**

Participation in ongoing job-related training as assigned. ~~None Specified~~

**CLEARANCES**

~~Criminal Justice Fingerprint/Background Clearance; TB Clearance~~ California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including Tuberculosis (TB) and drug screen clearances.

<b>Classification Review Report</b>	
Classification	Risk Management Technician
Classification Type	Classified
Salary Range	42
Submission to Classification Advisory Committee	1/22/15; 2/26/15; 4/23/15; 5/28/15
Submission to Personnel Commission	2/10/15; 5/5/15; 6/9/15
Agenda Item	Classification Revisions #7B

*This item was tabled at the May 5, 2015 Personnel Commission meeting for further research and discussion with the Classification Advisory Committee regarding the Working Environment section. This report now includes a specific recommendation for the Working Environment section.*

**Background Information**

Following the retirement of a Risk Management Technician in December 2014, the workers' compensation duties were transferred to the Human Resources Information Systems Support Analyst classification in the Human Resources Department. The Risk Management Technician's job description was written July 19, 2007, and has not been revised since that date. Upon review of the description it was determined that significant work performed by the incumbent in this class was not listed in the description. Personnel Commission staff interviewed the Director of Purchasing/Risk Management, and also conducted a survey of similar job descriptions within other San Diego County school districts. The description required significant revision; therefore, rather than submit one document with numerous strikethroughs, a new document has been created. Both the current description and the proposed draft are attached.

**Salary Compensation Review**

As part of a review of this classification, Personnel Commission staff conducted a salary compensation review. The findings from the review indicate there is no match for the duties and scope of responsibility as it relates to SDUHSD Risk Management Technician.

In Carlsbad Unified, Oceanside Unified, Ramona Unified, and San Marcos Unified the duties are distributed among multiple positions. They do not have a single classification responsible for this work. For example, in Ramona, the Personnel Technician, Administrative Assistant to the Assistant Superintendent and the Assistant Superintendent each handle different aspects of this work.

Escondido Union High, Grossmont, Poway, and Sweetwater districts each have a Risk Management Specialist. These positions are expected to perform higher level, more complex work than the position of Risk Management Technician. For example, each of these positions includes full range of responsibility with workers' compensation including responsibility for managing their Return-To-Work programs, maintaining data on leased/lease-purchase buildings, portables and equipment; preparing property endorsement requests, updating the Site Statement of Values for insurance underwriting and coverage records, assembling and submitting annual insurance underwriting surveys to the Joint Powers Authority; preparing and delivering staff training; participating on accident review panels, reviewing facts, listening to testimony and determining whether accidents were preventable; operating specialized equipment such as sound and light meters, air quality testers, humidity and temperature meters, and force gauges; reviewing supervisor reports and workers' compensation claims from legal and prevention standpoints; and preparing, submitting, monitoring and coordinating Student Accident Insurance claims. These duties are not within the scope of responsibility of SDUHSD Risk Management Technician.

Mira Costa, San Diego County Office of Education and Vista Unified School District each have management level positions that are responsible for these duties and are therefore not a match.

Staff reviewed the following classifications at San Diego County Office of Education:

Risk Management Technician II: acts as a liaison to districts with primary responsibility in benefits and workers' compensation

Claims Adjuster: responsible for investigation, evaluation, and negotiation of claims for auto and general liability litigated files for all JPA members

Claims Examiner: administration of the self-funded indemnity fringe benefit plans; analyzes and adjusts health, dental, and vision claims; administers payment of claims

Claims Investigator: investigates diverse, complex and sensitive claims and lawsuits filed against the JPA member districts

Loss Control Analyst (not an active classification): development, implementation, and evaluation of loss control and safety programs for the JPA member districts related to fire, student, public, occupational, motor vehicle, and physical plant safety; conducts site/facility inspections and accident investigations; provides consultation to member school districts to assist in preserving life, property and financial assets.

In summary, the SDUHSD Risk Management Technician job duties are focused on insurance, property and liability claims at a Technician level under the direction of the Director of Purchasing/Risk Management. Other school district job descriptions also include workers' compensation and/or employee benefits responsibilities, which requires additional knowledge in other disciplines. Salary ranges for jobs that had higher level responsibility for risk management duties as well as a broad scope of workers' compensation and/or benefits were equal to or, justifiably, \$2,000 - \$4,000 above the SDUHSD's Risk Management Technician annual salary range. Due to the structure of the work being performed and the division of responsibilities between the Technician and the Director, no salary change is recommended for the Risk Management Technician classification.

#### **Sources of Information**

Christina Bennett, Director of Purchasing/Risk Management

LeeAnn Howe, Risk Management Technician

Joint Powers Authority, San Diego County Office of Education

Comparable districts in San Diego County, San Diego County Office of Education, and Mira Costa Community College

**Recommendation**

- 1) It is recommended the references to workers' compensation duties be removed from the Risk Management Technician's job description.
- 2) It is recommended that the job description outline the Essential Functions as detailed in the proposed draft job description.
- 3) It is recommended that the Working Environment section be revised to align with the JPA, Standards for Working Conditions.
- 4) It is recommended that the Education and Experience sections be updated to provide clarity regarding the minimum qualifications for the classification and align with other lateral classifications.
- 5) There is no salary recommendation; however, CAC requests further study of internal alignment.

**\*Vote by Committee Members:**

Vote	Member	Vote	Member
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Yes	Matt Colwell, CSEA	Yes	Rick Mariam, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

\*The changes to the description were agreed upon by the CAC with the request for further study of internal alignment.

**Working Environment Section:**

Formal job analysis was conducted through a site visit and interview of the incumbent. Each task was analyzed for its physical aspects. The job analysis report was provided to the Classification Advisory Committee in support of the Working Environment section revisions. After discussion, the committee voted unanimously to approve the recommended working environment language.

**Vote by Committee Members regarding recommendation for revised Working Conditions section:**

Vote	Member	Vote	Member
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Yes	Matt Colwell, CSEA	Yes	Rick Mariam, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin



## Risk Management Technician

### OVERALL JOB PURPOSE STATEMENT

Under the direction of the Director of Purchasing/Risk Management, the job of Risk Management Technician performs specialized technical support and administrative duties for the District in the areas of insurance risk, risk control, loss analysis, property & liability claims and litigation, staff training and consultations, occupational safety and environmental health, regulatory compliance and budgeting; assure compliance with applicable laws, codes, rules and regulations.

### DISTINGUISHING CHARACTERISTICS

The Risk Management Technician is a specialized classification that performs complex technical and administrative duties within clearly established systems and procedures in support of functions such as insurance risk, risk control, loss analysis, property and liability claims and litigation, staff training and consultations, occupational safety and environmental health, regulatory compliance and budgeting; assure compliance with applicable laws, codes, rules and regulations.

### ESSENTIAL FUNCTIONS

- Support management in the processing of incoming liability and property loss claims and in the handling of in-house claims not managed by the District's TPA's; maintain files and monitor claims making sure the District responds to deadlines and statutes of limitations; prepare and mail legal notices on claims not processed by the District's TPA's.
- Support management in the investigation of injuries, vehicle and public accident incidents; assure proper procedures are followed; assist with the review and follow-up of injury and loss reports with a focus on prevention.
- Answer telephones and greet visitors; respond to inquiries from staff, the public and outside agencies regarding risk management policies and procedures; operate a variety of office equipment including a computer and assigned software; maintain calendar for Risk Management Department
- Prepare work orders and requisitions for department; receive, sort and distribute incoming mail and supplies; compose departmental correspondence; distributes a variety of risk management related information to staff and community members; maintain supply and equipment records.
- Assure payments from property/liability funds are paid on time; assist Purchasing and Finance departments with reviewing items submitted for purchase or reimbursement by others for appropriate use in the District.
- Assist in responding to subpoenas and Public Records Act requests; assist with preparation for pre-trial discovery and depositions; schedule conference rooms and witnesses for depositions.

## Risk Management Technician

- Maintain effective communication with claims adjustors, defense attorneys, insurance company representatives and Joint Powers Authority (JPA) personnel regarding claims and litigation.
- Maintain District-wide database on property and liability claims; analyze loss data and trends to identify opportunities for improvement.
- Assist the Maintenance & Operations Department with review of facility use requests to assure adequacy of insurance coverage, additional insured endorsements and risk-transfer agreements; arrange for issuance of Certificates of Insurance for outside agencies and contractors; review agreements, facility use permits and consultant contracts for proper insurance requirements.
- Provide monitoring support of expenses and contracts for a variety of programs such as General Property and Liability, Excess Liability coverage; prepare and submit requisitions and monitor expenses for property and liability expenses.
- Assist in assuring Comprehensive Safe School Plans and District Emergency Operations Center are current and properly utilized; assist in assuring District departments, offices and sites have current plans.
- Coordinate AED maintenance with school sites and order AED supplies.
- Coordinate and assist school sites with maintenance and upkeep of Hazardous waste materials program (HAZMAT business plan, HAZMAT waste disposal, EPA Permit management).
- Process claims related to damage of District property or vehicles.
- Establish and maintain claim files; assist with the preparation of various reports and summaries regarding claims and litigation and performance of insurance programs; revise and prepare forms or manuals for use throughout the District regarding safety or liability issues.
- Contact law enforcement, insurance companies, business and private parties to arrange for recovery of monies due to the District from losses caused by accidents or vandalism to District property.
- Prepare a wide variety of reports and summaries related to assigned activities; maintain confidentiality of sensitive and privileged information.
- Attend a variety of meetings, conferences and workshops to maintain current knowledge of applicable laws, codes, rules and regulations; monitor new legislation affecting assigned

## Risk Management Technician

activities; prepare and deliver oral presentations as needed or requested; as requested, attend meetings in the absence of the Director of Purchasing/Risk Management.

### OTHER FUNCTIONS

- Provide preliminary ergonomic assessments.
- Monitor compliance and record of independent study P.E. documentation.
- Assist with the preparation and delivery of staff training regarding insurance and safety procedures, ergonomics, general loss control and prevention; assist in the development of training opportunities.
- Perform a variety of special projects as assigned. Perform job related duties as assigned.

### JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

#### KNOWLEDGE, SKILLS AND ABILITIES

**SKILLS** are required to perform multiple non-technical and technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records; and tracking multiple, interrelated detail data and program parameters.

**KNOWLEDGE** is required in the understanding of Risk Management and Insurance laws, codes, rules and regulations and of the Regulatory agencies governing Risk Management and Insurance, as well as health and safety regulations. Knowledge of correct English usage, grammar, spelling, punctuation and vocabulary is required. Knowledge of basic budgeting practices regarding monitoring and control, and modern office practices, procedures and equipment is required. Knowledge of record-keeping and report preparation technique and telephone techniques and etiquette is required. Operation of a computer and assigned software is required. Knowledge is required to perform basic math functions including calculation of fractions, percent and/or ratios; to read a variety of manuals, to write documents following prescribed formats and/or present information before groups, and to understand complex multiple step instructions.

**ABILITY** is required to perform specialized technical support and administrative duties for the District in the areas of risk management including the ability to interpret, apply, explain and keep current on applicable laws, codes, rules, regulations, requirements and restrictions; learn District organization, operations, policies and objectives; prepare and maintain a variety of records, reports and files; understand and resolve issues, complaints or problems; understand and work within scope of authority; compose correspondence and written materials independently; and type or input data at an acceptable rate of speed; gather, collate and/or classify data;

**Risk Management Technician**

work with data of a confidential nature. The incumbent must be able to operate a variety of office equipment including a computer and assigned software; maintain confidentiality of sensitive and privileged information; communicate effectively both orally and in writing; meet schedules and timelines, and adapt to changing work priorities. The incumbent must establish and maintain cooperative and effective working relationships with a diverse population; and meet schedules and timelines. The incumbent must demonstrate effective interpersonal skills such as tact, patience and courtesy when communicating with others in person, on the telephone and through written correspondence; demonstrate flexibility under a wide variety of circumstances; demonstrate the ability to solve problems by analyzing issues, creating plans of action and reaching solutions.

**RESPONSIBILITY**

Responsibilities include: working under standardized instructions and/or routines focusing primarily on results; providing information and/or advising other persons; and operating within a defined budget and/or financial guidelines. Utilization of some resources from other work units may be required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

**WORKING ENVIRONMENT**

The usual and customary methods of performing the job's functions requires working in an office and driving a vehicle to an office or outdoor environment to conduct work. The job functions require the following physical demands:

Physical Demands Frequency Definitions Based on an 8-Hour Day:

- Seldom = 1-10% (<45 minutes)
- Occasionally = 11-33% (up to 3 hours)
- Frequently = 34-66% (up to 6 hours)
- Continuously = 67-100% (more than 6 hours)

Seldom or Occasionally	Lifting and carrying up to 50 pounds with/without assistance up to 10 feet; pushing and pulling, reach above shoulder, reach at shoulder, stooping/bending
Occasionally	Walking, standing, squatting/crouching
Occasionally or Frequently	Handling, simple grasping
Frequently	Lifting and carrying up to 10 pounds up to 25 feet, neck flexation/rotation, reach below shoulder, fingering/fine manipulation to operate a keyboard and special equipment
Frequently or Continuously	Sitting up to one hour in intervals

**AUDITORY OR VISUAL REQUIREMENTS**

Auditory ability to hear others in order to communicate and make presentations. Vision ability to see near, distant, depth and peripherally

**ENVIRONMENTAL CONDITIONS**

## Risk Management Technician

There is the potential for exposure to chemicals and fumes, for contact with dissatisfied or abusive individuals, and for traffic hazards. Some travel may be required to attend business meetings, conferences or workshops. Must be able to operate a vehicle requiring a California Class C driver's license.

### EXPERIENCE

Three years of increasingly responsible clerical and secretarial experience; involving financial or statistical record keeping, reviewing and processing documents for accuracy and compliance with program requirements, and involving public contact. Experience in risk management preferred.

### EDUCATION

High School Diploma or equivalent supplemented by college-level coursework in business or a related field. Additional qualifying experience may be substituted for the education requirement.

### REQUIRED TESTING

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

### CERTIFICATES

Valid California driver's license and a driving record acceptable to the District for insurance purposes.

### CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned

### CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including Tuberculosis (TB) and drug screen clearances.

## RISK MANAGEMENT TECHNICIAN

### OVERALL JOB PURPOSE STATEMENT

Under the direction of the Executive Director of Business Services, the job of Risk Management Assistant is done for the purposes of performing a range of complex work monitoring and coordinating workers' compensation claims and long-term leaves, creating and maintaining accurate documentation, providing assistance to injured and ill employees with respect to timelines, benefit parameters, available leave options, and worker's compensation program requirements, and serving as the clerical liaison to insurance carriers and third-party claims administrators.

### DISTINGUISHING CHARACTERISTICS

The Risk Management Assistant is a specialized classification that performs complex clerical and technical duties within clearly established systems and procedures in support of functions such as tracking of worker's compensation claims, accounting for long-term leaves and coordinating this information with the payroll system and claims management system. This includes communicating sensitive and confidential information to employees and managers, calculating the appropriate time and pay adjustments to reflect effects of paid/unpaid leaves on pay warrants, and reporting the days/hours employees are absent in order for the district to collect accurate reimbursement from the worker's compensation insurance carrier. Most tasks are performed independently and in unusual situations the incumbent recommends appropriate actions to the supervisor consistent with applicable laws, policies, procedures, and practices.

### ESSENTIAL FUNCTIONS

- Performs a variety of complex technical work primarily in the area of workers' compensation and long-term leave benefits; maintains knowledge of and assures compliance with applicable laws, codes, rules, regulations and contract provisions.
- Monitors, coordinates and communicates workers' compensation claims with injured employees, management, and claims administrators; analyzes circumstances of claims; assures prompt delivery of medical services and informs employees of benefit entitlements.
- Provides information and assistance to employees and District staff; interprets, applies, and explains laws, codes, rules, regulations and contract provisions; provides guidance and advises supervisors, managers and site representatives regarding workers' compensation and long-term leave issues.
- Assists site representatives and supervisors in the preparation of accident reports; receives and reviews claim reports; obtains needed information from supervisors and employees; works with third-party claims administrators, investigators, and insurance company representatives.
- Prepares required workers' compensation claim forms and submits documentation within the Department of Industrial Relations' timeline mandates to the third-party claims administrator.
- Determines employee eligibility and entitlements for various long-term leave benefits such as industrial accident leave, sick leave, donated leave, Family Medical Leave Act, California Family Rights Act, Pregnancy Disability Leave, long-term disability, etc.

- Ensures that solicitations for donated/catastrophic sick leave programs meet applicable certificated/classified bargaining unit contract program criteria; monitors usage of the leave.
- Communicates with a variety of District personnel, insurance carriers, rehabilitation counselors, claims examiners, attorneys, investigators, and medical personnel to resolve issues and coordinate activities.
- Composes correspondence to employees for the purpose of explaining their benefits, work status, absences, and available leaves, and placement on unpaid leave.
- Tracks work status of employees who are injured, ill, or on long-term leave to determine if employees can work while recovering under a physician's care or anticipated return date; communicates work status and physical restrictions to supervisors; coordinates return-to-work and transition to full duty within doctor restrictions.
- Apprises management regarding status of claims and long-term leaves through review of reports, claims and claim documentation and contacts with employees and supervisors.
- Coordinates/maintains a variety of files and records, logs, and reports related to workers compensation and long-term leaves; establishes and maintains filing systems; assures record-keeping and reporting complies with established rules and regulations.
- Uses District software systems to track long-term leaves, make adjustments to leave accounts,
- Processes documents/data (e.g. payroll, salary, benefit documents, etc.) for the purpose of timely recording and/or reporting of benefit/s, tax information, and other related data.
- Compiles/prepares various reports (e.g. periodic summaries of individual leave accounts, reports of leaves, payroll data, etc.) for the purpose of providing information and an audit trail.
- Attends in-services, classes, workshops, conferences, etc. for the purpose of providing the District with new policies and procedures.

#### **OTHER FUNCTIONS**

- Processes claims related to damage of District property or vehicles.
- Performs other related duties as assigned.

#### **JOB REQUIREMENTS: MINIMUM QUALIFICATIONS**

#### **KNOWLEDGE, SKILLS AND ABILITIES**

**KNOWLEDGE** is required to perform basic math including calculation of fractions, percents and/or ratios; read a variety of manuals, write documents following prescribed formats and/or present information before groups, and understand complex multiple step instructions. Specific knowledge required to satisfactorily perform the functions of the job includes time and attendance accounting procedures, leave policies, worker's compensation program requirements, concepts of grammar and punctuation.

**SKILLS** are required to perform multiple non-technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records; communicating to employees an dmanager critical, sensitive, and confidential leave and entitlement benefits and time lines, and tracking multiple, interrelated detail data and program parameters.

**ABILITY** is required to schedule a number of activities; often gather, collate, and/or classify data; and use basic job related equipment. Flexibility is required to work with others under a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of different types and/or purposes; and utilize job related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is moderate to significant; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating sensitive and confidential health-related information and benefit entitlements as appropriate with diverse groups; maintaining confidentiality; meeting deadlines and schedules; working with detailed information/data of a confidential nature; keeping updated on legal, regulatory and program requirements.

#### **RESPONSIBILITY**

Responsibilities include: working under standardized instructions and/or routines focusing primarily on results; providing information and/or advising other persons; and operating within a defined budget and/or financial guidelines. Utilization of some resources from other work units is may be required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

#### **WORKING ENVIRONMENT**

The usual and customary methods of performing the job's functions requires the following physical demands: occasional lifting, carrying, pushing and/or pulling; some climbing and balancing; some stooping, kneeling, crouching and/or crawling; significant reaching, handling, fingering and/or feeling. Generally the job requires 80% sitting, 10% walking and 10% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.

#### **EDUCATION**

High School Diploma or equivalent supplemented by college-level course work in business, human resources or a related field. Additional qualifying experience may be substituted for the education requirement.

#### **EXPERIENCE**

Two years related experience involving financial or statistical record keeping, reviewing and processing documents for accuracy and compliance with program requirements, and involving public contact.

#### **REQUIRED TESTING**



None Specified

**CERTIFICATES AND LICENSING**

None Specified

**CONTINUING EDUCATION/TRAINING**

None Specified

**OTHER REQUIREMENTS**

Criminal Justice/Fingerprint Clearance; TB Clearance

<b>Classification Review Report</b>	
Classification	Human Resources Technician
Classification Type	Classified
Salary Range	42
Submission to Classification Advisory Committee	4/23/15; 5/28/15
Submission to Personnel Commission	5/5/15; 6/9/15
Agenda Item	Classification Revisions #7C

*This item was tabled at the May 5, 2015 Personnel Commission meeting for further research and discussion with the Classification Advisory Committee regarding the Working Environment section. This report now includes a specific recommendation for the Working Environment section.*

**Background Information**

The classification of Human Resources Technician performs a wide variety of complex clerical functions related to the employment of certificated or classified employees; maintains a variety of employee-related forms, records, reports, and databases; and provides assistance to prospective and current employees. There is currently one incumbent and one vacancy in the Human Resources Department and one incumbent on the Personnel Commission staff. The vacancy prompted a review of the job description, which was last updated on July 1, 2001.

The Personnel Commission staff met with the incumbents and management to review the job description and to identify key Essential Functions that no longer applied, needed updating, or needed to be added. There were no changes to the level of responsibilities for this classification. Some descriptions of duties did not provide the detail that was needed to adequately explain the duties being performed. Additional detail is now provided in the proposed job description. In addition, the Working Environment section of the description was updated to reflect the physical and environmental conditions associated with this classification as per the JPA of San Diego County Office of Education model language.

**Salary Compensation Review**

District	Salary Range	Job Title	Minimum	Maximum
Mira Costa CC	20	Human Resources Technician	\$55,092	\$67,179
SDCOE	48	Human Resources Technician I	\$43,776	\$55,872
Sweetwater UHSD	56	Human Resources Technician	\$44,712	\$54,996
Escondido UHSD	32	Personnel Technician I	\$37,572	\$50,352
Vista USD	49	Human Resources Technician	\$36,648	\$49,284
Grossmont UHSD	42	Personnel Technician	\$38,376	\$48,720
Oceanside USD	22	Human Resources Assistant	\$35,952	\$45,396
San Marcos USD	41	Personnel Data Technician	\$34,848	\$44,508
Poway USD	25	Human Resources Assistant	\$30,684	\$39,240
Ramona USD	22	Personnel Technician	\$30,024	\$39,208
Carlsbad USD	-	-	-	-
Average			\$38,834	\$49,476

<b>SDUHSD</b>	<b>42</b>	<b>Human Resources Technician</b>	<b>\$40,476</b>	<b>\$51,774</b>
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**Sources of Information**

Joint Powers Authority, San Diego County Office of Education  
 Torrie Norton, Associate Superintendent Human Resources  
 Tina Peterson, Director of Human Resources  
 Lindsey Shook, Human Resources Information Systems Support Analyst  
 Shirley Janssen and Kathy Potter, Human Resources Technicians  
 Comparable districts in San Diego County, San Diego County Office of Education, and Mira Costa Community College

**Recommendation**

It is recommended the Human Resources Technician job description be revised as proposed. There is no salary recommendation; however, CAC requests further study of internal alignment.

**\*Vote by Committee Members:**

Vote	Member	Vote	Member
Y	Carmen Blum, CSEA	Y	Dan Love, Admin
Y	Matt Colwell, CSEA	Y	Rick Mariam, Admin
Y	Debbie Johnson, CSEA	Y	Tina Peterson, Admin

\*The changes to the description were agreed upon by the CAC with the request for further study of internal alignment.

**Working Environment Section:**

Formal job analysis was conducted through an interview of one incumbent. Each task was analyzed for its physical aspects. The job analysis report was provided to the Classification Advisory Committee in support of the Working Environment section revisions. After discussion, the committee voted unanimously to approve the recommended working environment language.

**Vote by Committee Members regarding recommendation for revised Working Conditions section:**

<b>Vote</b>	<b>Member</b>	<b>Vote</b>	<b>Member</b>
Yes	Carmen Blum, CSEA	Yes	Dan Love, Admin
Yes	Matt Colwell, CSEA	Yes	Rick Mariam, Admin
Yes	Debbie Johnson, CSEA	Yes	Tina Peterson, Admin

## HUMAN RESOURCES TECHNICIAN

### OVERALL JOB PURPOSE STATEMENT

The job of Human Resources Technician performs a wide variety of complex clerical functions related to the employment of certificated or classified employee programs; maintains a variety of employee-related forms, records, reports and databases; provides assistance to prospective and current employees.

### DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: The Human Resources series performs specialized clerical and technical work in support of the District's employment and human resources programs.

### ESSENTIAL FUNCTIONS

- Perform a variety of technical duties and provide assistance to prospective and current personnel; Assist in resolving non-disciplinary employee issues and concerns with discretion and confidentiality; refer more difficult or sensitive issues to supervisor as needed. Refer to applicable laws, rules, policy and codes to answer applicant and employee questions.
- Participate in recruitment, screening, testing, test materials production, interviewing, selection and employment of personnel; communicate with job applicants and provide information related to employment and the examination and hiring process; communicate test dates, test results, oral interviews, rejections or make offers of employment.
- Prepare and explain the pre-employment background check and physical test process to new hires. Process new hires, including full-time, temporary, short-term, non-bargaining unit, substitutes, coaches, etc.; monitor certifications (CPR/First Aid) and trainings as required. Assist hiring supervisor with coordination of work site orientation as needed.
- Maintain the employee photo database, document and retrieve photos from the database, take photos, and create name badges.
- Locate substitute staff as assigned by the position; operate an automated sub-finder system; identify location and hours required and inform substitutes; process related paperwork and maintain related records. Monitor substitute activity to determine reasonable assurance of continued employment.
- Monitor HR staff schedules and enter their absences and overtime.
- Process payment and time activity for employees and coaches in compliance with the approved salary schedules.
- Maintain position control records as assigned; process requisitions to complete new employment, employment status changes, and terminations.

## HUMAN RESOURCES TECHNICIAN

- May assist with the preparation for the annual benefits event for the purpose of enrolling/re-enrolling employees in their choice of health, dental and other insurance plans contracted by the District.
- Maintains files, records and lists for the purpose of providing current data on employees, applicants, students and the district for management information needs and for producing regular reports to other agencies.
- Prepares/composes/distributes meeting minutes, lists, memos, letters, forms for the purpose of providing accurate and complete documents. May perform a variety of specialized duties to assist the Personnel Commission, such as preparing, assembling and distributing Commission materials; attend Personnel Commission meetings, and take and transcribe minutes.
- Processes applications, unemployment or other entitlement/benefit claims for the purpose of providing timely and accurate information and explaining policies, procedures and regulations.
- Reviews/compares a variety of documents and requests (e.g. TB Certificates, schedules, contracts, etc.) for the purpose of ensuring completeness and accuracy.
- Schedule and participate in new employee orientation sessions and employee recognition programs.
- Maintain seniority lists, personnel files, unemployment information, classified probationary dates, classified employee evaluations and other employee information as assigned. Provide reminders to supervisors and track the timely completion of classified probationary and permanent employee evaluations.
- Answer phones, take messages, transfer calls, verify employment, greet visitors, attend meetings, and other duties as assigned.
- Maintain employee records and files with discretion according to established procedures, policies, rules and regulations.
- Operate a variety of office equipment including computers, and use a variety of software applications including databases, spreadsheets, word processing, etc. Inventory and order office supplies, forms and other materials as needed; prepare requisitions and travel reimbursement requests, and maintain records of expenditure.

## OTHER FUNCTIONS

- Perform other job related duties as assigned.

## HUMAN RESOURCES TECHNICIAN

### JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

#### KNOWLEDGE, SKILLS AND ABILITIES

**KNOWLEDGE** is required to perform basic math including calculation of fractions, percents and/or ratios; read technical information; compose a variety of documents and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: human resources practices applied within a school district; concepts of grammar and punctuation; concepts of electronic spreadsheets, word processing, and databases; rules, regulations, policies and procedures pertaining to employment, , basic benefits information; applicable sections of State Education Codes and other pertinent laws; District organization, operation, policies and objectives. Must have knowledge of recruitment and staffing procedures and/or employee onboarding procedures.

**SKILLS** are required to perform multiple technical tasks with an occasional need to upgrade skills due to changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; preparing and maintaining accurate records.

**ABILITY** is required to maintain confidentiality of sensitive and privileged information; complete work with many interruptions; schedule a number of activities; often gather, collate and/or classify data; and use basic, job-related equipment. Flexibility is required to work with others under a variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; assist individuals with processing applications, forms, and enrollments; work with data of different types and/or purposes; and utilize job-related equipment. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is moderate. Specific abilities required to satisfactorily perform the functions of the job include: adapting to changing work priorities; adapting to continuous technology changes and willingness to learn new software applications; communicating with diverse groups; maintaining confidentiality; meeting deadlines and schedules; working as part of a team; and working with detailed information/data.

#### RESPONSIBILITY

Responsibilities include: working under limited supervision following standardized instructions and/or routines focusing primarily on results; leading, guiding and/or coordinating other persons; and operating within a defined budget and/or financial guidelines. Significant utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

#### WORKING ENVIRONMENT

~~The usual and customary methods of performing the job's functions requires the following physical demands: occasional lifting, carrying, pushing, and/or pulling; some climbing and balancing; some stooping, kneeling, crouching, and/or crawling; and significant reaching, handling, fingering and/or~~

**HUMAN RESOURCES TECHNICIAN**

~~feeling. Generally, the job requires 80% sitting, 10% walking and 10% standing. The job is performed under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere.~~

The usual and customary methods of performing the job's functions requires working in an office. The job functions require the following physical demands:

**Physical Demands Frequency Definitions Based on an 8-Hour Day:**

- Seldom = 1-10% (<45 minutes)
- Occasionally = 11-33% (up to 3 hours)
- Frequently = 34-66% (up to 6 hours)
- Continuously = 67-100% (more than 6 hours)

Seldom or Occasionally	Lifting and carrying up to 50 pounds with/without assistance up to 10 feet; Pushing and pulling, reach above shoulder, reach at shoulder, stooping/bending,
Occasionally	Walking, standing, squatting/crouching, lifting and carrying up to 25 pounds up to 25 feet
Occasionally or Frequently	Handling, simple grasping
Frequently	Lifting and carrying up to 10 pounds up to 25 feet ; neck flexation/rotation, reach below shoulder, fingering/fine manipulation to operate a keyboard and special equipment
Frequently or Continuously	Sitting up to one hour in intervals

**AUDITORY OR VISUAL REQUIREMENTS**

Auditory ability to hear others in order to communicate and make presentations. Vision ability to see near, distant, depth and peripherally.

**ENVIRONMENTAL CONDITIONS**

There is the potential for contact with dissatisfied or abusive individuals. Some travel may be required to attend business meetings, conferences or workshops. Must be able to operate a vehicle requiring a California Class C driver's license.

**EDUCATION**

High School Diploma or equivalent supplemented by college-level coursework in human resources or a related field. Additional qualifying experience may be substituted for the education requirement.

**EXPERIENCE**

Three years of increasingly responsible clerical or secretarial experience including complex record keeping, reviewing and processing documents for accuracy and compliance with program requirements, and involving public contact. One or more years of experience in Human Resources or working with personnel-related matters; experience in a school district or public administration environment is preferred but not required. Proficiency with databases (data entry, searches, reporting), word processing, and electronic spreadsheets is required.



**HUMAN RESOURCES TECHNICIAN**

**REQUIRED TESTING**

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

**LICENSES AND CERTIFICATES**

Possession of a valid State of California Class C or higher driver's license and evidence of insurability.

**CONTINUING EDUCATION/TRAINING**

Participation in ongoing job-related training as assigned.

**CLEARANCES**

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including Tuberculosis (TB) and drug screen clearances.



**Board of Trustees**  
Joyce Dalessandro  
Beth Hergesheimer  
Amy Herman  
Maureen "Mo" Muir  
John Salazar

**Union High School District**

**Superintendent**  
Rick Schmitt

710 Encinitas Boulevard, Encinitas, CA 92024  
Telephone (760) 753-6491  
Fax (760) 943-3522  
www.sduhsd.net

**Classified Personnel Commission**  
John Baird, Commissioner  
David Holmerud, Commissioner  
Terry King, Commissioner  
Corrie Amador, Director

June 9, 2015

**TO:** Personnel Commission

**FROM:** Corrie Amador  
Director of Classified Personnel

**SUBJECT: Agenda Item #8: Annual Membership and Service Agreement Renewals**

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The Personnel Commission and staff receive invaluable support and information from several key agencies in order to conduct business. It is recommended the Personnel Commission approve the continued annual membership and service agreement fees for the 2015/16 school year.

*California School Personnel Commissioners Association (CSPCA)*

Annual Dues: \$776

Invoice Enclosed

A statewide professional development organization for merit system districts.

*San Diego County School Personnel Commissioners Association (SDCSPCA)*

Annual Dues: \$50

Invoice pending

The regional chapter for merit system districts in San Diego County affiliated with the statewide organization, acts a resource to Personnel Commissioners and staff

*Cooperative Organization for the Development of Employee Selection Procedures (CODESP)*

Annual Service Agreement: \$1,850

Invoice Enclosed

An agency that supports public employers with test development, selection items, and item analysis

*Education Job Opportunities Information Network (ED-JOIN)*

Annual Service Agreement: \$749 (District splits fees)

Invoice Pending

On-line recruiting and applicant tracking system



**California School Personnel Commissioners  
Association  
Annual Association Dues Invoice**

**Invoice # 66-2015-16**

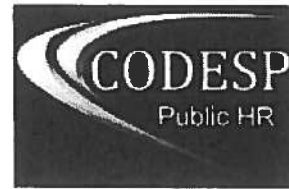
**Date: 4-7-15**

<b>Bill To:</b>	<b>Send Payment To:</b>
San Dieguito UHSD 710 Encinitas Blvd. Encinitas, CA 92024-3357 Director: Corrie Amador <u>corrie.amador@sduhsd.net</u> <u>760-753-6491x5543</u>	Jennie Batiste 681 Daniel Dr. Santa Maria, CA 93454 <u>jenniebatiste2@gmail.com</u> (805) 714-6455

**Please pay by check payable to CSPCA and include a copy of  
this invoice.**

<b>Dues Year</b>	<b>Number of Classified Employees</b>	<b>Dues Amount</b>
2015-16	435	\$776.00

CODESP  
 20422 Beach Blvd. Suite 325  
 Huntington Beach CA 92648  
 Phone: 714-374-8644



San Dieguito Union High  
 Corrie Amador  
 710 Encinitas Blvd.  
 Encinitas 92024-3357

<b>Invoice #:</b>	0002330
<b>Date:</b>	July 1, 2015
<b>Amount Due USD:</b>	\$1,850.00

**To View Your Invoice Online »**

1. Go to: <https://codesphr.freshbooks.com/code>
2. Enter this code: y2ychNThBHsNwRJ

Item	Description	Unit Cost (\$)	Quantity	Price (\$)
Annual Membership Fee	Products and services beginning July 1, 2015 and ending June 30, 2016.	1,850.00	1	1,850.00
<p>NOTES: Make all checks payable to CODESP</p> <p>THANK YOU FOR YOUR MEMBERSHIP!</p> <p>Help us go green - Rather than fax, please scan and email documents to <a href="mailto:codesp@codesp.com">codesp@codesp.com</a></p>				
<b>Subtotal:</b>				<b>1,850.00</b>
<b>Total:</b>				<b>1,850.00</b>
<b>Amount Paid:</b>				<b>-0.00</b>
<b>Balance Due USD:</b>				<b>\$1,850.00</b>
<p>NET 45            Taxpayer ID No. 54-2166843</p> <p>No additional fees for taxes required. CODESP is a Public Agency</p> <p><a href="http://www.codesp.com">www.codesp.com</a></p> <p>Contact us: <a href="mailto:codesp@codesp.com">codesp@codesp.com</a> or (714) 374-8644</p>				

This invoice was sent using FRESHBOOKS

**2.15 General Duties of the Personnel Director**

C. In cases where two or more rules appear to be in conflict, or when no rules provide a clear-cut answer to a problem, the matter shall be decided by the Personnel Director subject to appeal to the Commission. (EC 45266)



**Union High School District**

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**Superintendent**  
Rick Schmitt

**Classified Personnel Commission**  
John Baird, Commissioner  
David Holmerud, Commissioner  
Terry King, Commissioner  
Corrie Amador, Director

June 9, 2015

**TO:** Personnel Commission

**FROM:** Corrie Amador  
Director of Classified Personnel

**SUBJECT: Agenda Item #11: Personnel Commission Rules – Chapter 3**

In discussion regarding Chapter 3 of the Personnel Commission Rules and Regulations questions came up regarding Rule 3.11 and 3.13 specifically regarding the authority of the Commission to establish a retroactive effective date for a reclassification. Additional questions pertained to whether the language in Rule 3.13 conflicted with the rights of the Association and the District in negotiating the effects of reclassification.

Points to consider in regards to the effective date of a reclassification:

Education Code Section 45285.5 and Personnel Commission Rule 3.5.A requires the Commission provide reasonable notice of the proposed classification changes to the District and the Association before they can be implemented.

Rule 3.11 K: Reclassifications may "result in upgrading, downgrading, lateral class movement, bumping, or complete displacement of incumbents."

Therefore, when establishing the effective date of a reclassification, we must consider several factors:

- 1) The case-by-case impact on the employee;
- 2) The rights of the District and the Association to bargain the effects of the reclassification;
- 3) The potential impact on staffing allocations and consequence of reduction in force;
- 4) And the potential need for testing when an incumbent has not been in the position for a minimum of two complete years.

As you know, the Association and the District have the right to negotiate effects of a reclassification as stated in Rule 3.12 and the Master Contract, Article 17.B. The Contract defers to the Commission to establish the effective date of individual reclassifications, but

requires negotiations for any group reclassifications. Rule 3.13 mirrors the language in the Contract.

Advice from legal counsel indicates the current language in Rule 3.13 does not recognize the District and Association's rights to negotiate the effects of a reclassification under the EERA. Due to the potential impact of reclassification of a position on the incumbents, it is proposed the Commission consider a rule revision which would establish an effective date of reclassification to occur on a future date following Commission approval of the reclassification. Additionally, language should be included to recognize the ability of the Association and the District to negotiate a retroactive effective date with the understanding that date must adhere to Education Code 45285(b), whereby reclassification is based on a gradual accretion of duties. A suggestion for revision to the language would be:

*A. Reclassification of a position shall become effective on the date prescribed by the Commission. Effective dates may be set as of the first day of the month following the date of the Commission's action, or it may be set sufficiently in the future to allow time for examinations to be completed, but not more than three months. The Personnel Director shall be responsible to determine if an employee may be reclassified with the position or required to qualify by examination based on criteria outlined in Rule 3.11.*

*B. When a position or group of positions is reclassified, the effective date of the reclassification may be determined by meet and negotiation between the Board's Representative and the Representative of the recognized employee group(s). The effective date shall not be in conflict with Education Code Section 45285.*

Should the Commission deem this approach as reasonable, a draft of Rule 3.13 will be developed and provided to the District and CSEA for review. The draft would then be submitted to the Commission at a future meeting.

In review of the draft previously submitted, I would like to request additional time to review Rule 3.11. There are several areas where items can be combined or further clarified. If this is acceptable, a draft of Rule 3.11 will be provided to the District and CSEA for additional review and discussion.

## DRAFT

### PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT Rules and Regulations for the Classified Service

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#### Chapter 3

#### CLASSIFICATION

##### 3.1 Positions Included in the Classified Service

All positions established by the Board of Trustees, which are not exempt from the classified service by law, shall be a part of the classified service. All employees serving in classified positions shall be known as the classified service. **(EC 45256)**

##### 3.2 Positions Excluded From the Classified Service

###### A. General:

1. Positions required by law to have certification qualifications.
2. Part-time playground positions where the employee is not otherwise employed in a classified position.
3. Full-time day students employed part-time
4. Part-time students employed part-time in any college work study program, or in a work experience education program conducted by a community college district and which is financed by state or federal funds
5. Apprentices, and professional experts employed on a temporary basis for a specific project by the Board or by the Commission, when so designated by the Commission, shall be exempt from the classified service. **(EC 45256)**
6. Senior Management (EC 45256.5)

B. With regard to persons employed under provisions of the Education Code **(EC 45256)**, if a permanent classified employee is appointed to serve in such an exempt position, the employee shall retain status as a permanent employee. ~~If the employee is terminated from the exempt position, for reasons other than cause, If an exempt position is eliminated,~~-bumping rights shall be granted in the former class in the same manner as if the employee had been laid off for lack of work or lack of funds.

C. Special Categories: The Board of Trustees may create positions of staff assistants or field representatives to directly assist the Board or individual Board member. Such positions, if created, are exempted from the provisions of these Rules insofar as they relate to position classification, recruitment, employment, and salary setting. **(EC 45112)**

D. Persons employed in such positions shall be members of the classified service for all purposes except that they may not achieve permanency in the classified service as a result of this service except as provided by the Code. **(EC 45112, 45256.5, 45272)**

E. Senior management positions shall be filled from unranked lists developed by the Personnel Commission and arrived at by competitive examination(s) as determined by the Commission.



## DRAFT

### PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

#### Rules and Regulations for the Classified Service

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- F. “Part-Time” Defined: A part-time position, for the purpose indicated in this Rule, is one for which the assigned time when computed on a monthly basis is less than 87.5 percent of the time normally assigned to the majority of the classified employees in the classified service for one month’s pay period. For a 20-day work month this amount would be less than 140 hours for the month (an average of 7 hours per day, 35 hours per week). **(EC 45256)**
  
- G. Effect of Exemption: Any position or employee lawfully exempted from the classified service shall be excluded from the benefits and burdens imposed by these Rules, except as provided by law or the Board of Trustees.

### 3.3 Employment of Professional Experts and Community Representatives

- A. When a professional expert is to be employed by the Board of Trustees, the Superintendent of Schools, or the Commission, there shall be submitted to the Director a description of the project, its duration, and the duties to be performed. Professional expert assignments shall not be made to avoid payment of overtime to the assigned employee, nor shall a limited-term position be filled by a professional expert assignment if the duties and responsibilities fit an existing class for which a reemployment or eligibility list exists. **(EC 45256/45258)**
  
- B. When the person is known who is to be appointed as a professional expert, name and data relative to the person’s qualifications shall be submitted to the Personnel Director. In order to be exempted from the classified service or professional expert, individuals must be recognized as such by reputable members of their profession.

### 3.4 Assignment of Duties

The Board of Trustees **or their designee** shall prescribe the duties and responsibilities of all positions in the classified service except those on the Personnel Commission Staff.

### 3.5 Classification Plan

- A. The Personnel Commission shall classify all employees and positions in the classified service, with due advance notice to all interested parties. To classify shall include, but not be limited to, allocating positions to appropriate classes, occupationally ranking classes, determining relationships, and preparing written class specifications. **(EC 45256)**
  
- B. The classification plan shall consist of classes placed in groups according to general occupational nature and listed in a series by specific occupation and by salary range.
  
- C. The Commission may establish, redefine, merge or abolish classes.
  
- D. The Commission will consider recommendations from the District and the exclusive bargaining representative before taking final classification action on positions that belong to the bargaining unit.
  
- E. The Commission will ensure that the District and the exclusive bargaining representative have reasonable notice of proposed classification or reclassification. If the District and

**PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

**Rules and Regulations for the Classified Service**

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the exclusive representative have a mutually agreed joint forum, the Commission will use that avenue for communication. If such forum is not available, the Commission will communicate directly with the District and the exclusive bargaining representative.

**3.6 Class Specifications**

For each class of positions, as initially or subsequently established by the Commission, there should be established and maintained a class specification which shall include:

- A. The official class title;
- B. A definition of the class, including a summary of the duties;
- C. Examples of duties;
- D. Some of the required skills, knowledge, and abilities;
- E. The minimum qualifications for the class;
- F. Any special license or desirable skills (e.g. bilingual);
- G. Any special designations (e.g. supervisory, administrative, executive) ~~and the length of the probationary period;~~
- H. The date the class specification was adopted.

Minimum qualifications may never require a teaching, administrative, or other credential, nor may they require work experience, which essentially would restrict applicants to credential holders. Titles may not be assigned that would restrict competition to holders of credentials.

**3.7 Interpretation of Class Specifications**

- A. The definition and typical tasks are descriptive and explanatory only and not restrictive. They indicate the kinds of positions that should be allocated to the respective classes as determined by their duties, responsibilities, and qualification requirements, and do not prescribe what these details shall be in respect to any position. The use of a particular expression or illustration as to duties, responsibilities, qualifications, requirements, or other attributes is typical or descriptive of the class and does not exclude others not mentioned, but of similar kind and/or quality as determined by the Personnel Commission.
- B. In determining the class to which any position shall be allocated, the description for each class is considered as a whole. Consideration is given not to isolated clauses, phrases, or words, apart from their context and from illustrative information in other parts of the specifications, but to the general duties, responsibilities, specific tasks, and qualification requirements as affording a picture of the positions that the class includes.

## DRAFT

### PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

#### Rules and Regulations for the Classified Service

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- C. Each class specification should identify its proper relationship to other descriptions, particularly those of classes in the same series and group of classes, in such manner as to maintain a proper gradation in the series in which the class is located and proper differentiation within the group of classes.
- D. Qualifications commonly required of the incumbents of all or many offices or positions, such as ~~freedom from disabling defects such that would render a candidate unable to perform the full range of duties and responsibilities of the position~~ ability to perform the essential functions of the job with or without reasonable accommodation, citizenship (see Labor Code), honesty, sobriety and industry, even though not specifically mentioned in the specifications, are implied in the qualification requirements. This section does not restrict the Board from employing ~~the handicapped~~ individuals with disabilities to meet affirmative action goals.
- E. The Qualification requirements, when considered with other parts of the specifications, are to be used as a guide in the announcement and preparation of tests and in the evaluation of the qualifications of candidates seeking appointment to positions allocated to the class, but do not require a particular form or content of test or testing procedure.
- F. The class title shall always be used with the meaning set forth in the remainder of the specification.

#### 3.8 Classification of New Positions

- A. When a new position is established, the District shall submit a written statement to the Commission staff for review.
- B. The Personnel Director, subject to approval by the Commission, shall study the information and may classify the position to an existing class.
- C. If the Director finds that a new class is required, the Director shall prepare a report, a class description, and a recommendation to the Commission regarding occupational ranking and allocation of the new class to a salary range. **(EC 45276)**
- D. The Personnel Commission shall communicate its action to the Board of Trustees.

#### 3.9 Working Out of Classification

Employees are not expected to work out of classification, but when required to do so, the fact shall be reported to the Personnel Director who shall immediately investigate and report to the Personnel Commission. An employee may be required to perform duties out of classification when the duties relate to that classification, but not for a period of more than five working days within a 15-calendar-day period. The salary of an employee working more than five days within a 15-calendar-day period shall be adjusted upward to the step on the salary range of the higher classification so as to provide at least a 5 percent increase for the entire period of required work out of classification. After review, the Commission shall take such action as necessary based upon the facts. This rule shall not be construed as permitting an employee to refuse to perform duties assigned by the employee's supervisor. **(EC 45110)**

**PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

Rules and Regulations for the Classified Service

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**3.10 Changes in Duties of Positions**

When the duties of a position are permanently changed, the District shall prepare a position description and submit such data to the Commission. The Personnel Director shall investigate the data and make a determination if the position should be reclassified. If the Director finds that a position should be reclassified to an existing class, such data shall be presented to the Commission for action including class description, proposed class salary, proposed occupational ranking and a determination regarding gradual assignment of duties.

**3.11 Effect of Classification Changes on Incumbents**

- A. If the duties have been assigned gradually (not a reorganization or sudden change of duties), an employee shall be reclassified along with the position if he or she has been in one or more of the positions being reclassified for ~~three~~ two or more years ~~and the most recent performance evaluation was at least satisfactory.~~ **(EC 45285)**
- B. If a person is in a position which is being reclassified and has not been in the position for ~~three~~ two or more years, he or she must compete in a new examination, and pass the examination and place on the eligibility list to be promoted. **(EC 45285)**
- C. An examination will be given when there is a reorganization or sudden change in duties.
- D. When a position is reclassified downward, the incumbent shall be given the opportunity to be reassigned to an available vacant position in the present class.
- E. When a position is reclassified downward and the incumbent chooses to retain placement in the position rather than reassignment to a vacant position in the present class, he or she shall receive the salary in the salary range of the lower class closest to the former salary and shall not be granted reemployment rights.
- F. When an employee is reclassified upward with a position, he or she shall be ineligible to be reclassified upward again with the position for two years.
- G. When a position has been reclassified to another class which is at the same level, the incumbent of the position who has chosen to be reclassified shall be granted status in the new class without further examination.
- H. When a position or group of positions is reclassified to a class on the same salary schedule, the employee may elect to be reclassified with the same position or to exercise any applicable bumping rights. The reclassified employee shall not be required to qualify by examination for the new class or, if the current duties have been performed for 6 months, to complete a new probationary period.
- I. When two or more classes are merged because of change in the classification plan, the seniority in the new class of any continuing employee whose former class has been abolished shall include applicable service in the abolished class.

**PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

Rules and Regulations for the Classified Service

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- J. Any displacement of a regular employee resulting from reclassification of a position, positions, or class of positions, shall be considered a layoff for lack of work, and an appropriate reemployment list shall be established; displaced employees shall be eligible for reemployment for a period of 39 months with regard to the period of eligibility. **(EC 45298)**
- K. This Rule shall be followed in all instances of reclassification whether it results in upgrading, downgrading, lateral class movement, bumping, or complete displacement of incumbents.

**3.12 Review of Positions**

- A. The Personnel Director shall study positions as necessary to determine proper classification and shall cause all positions to be reviewed periodically. If the Director finds that a position or positions should be reclassified, the Administration shall be advised by these findings. If the Administration verifies the duties of the position, or if the duties are not revised to fit within the current classification, the Director shall report these findings and recommendations to the Commission. Reports of findings shall also be made to the Commission in cases where the review indicates no change in classification is necessary.
- B. Requests for classification study of existing positions shall be presented to the Personnel Director together with a statement of the reasons for requesting the study. Requests for study may be initiated by the administration with the approval of the Superintendent, or by employees or employee organizations. Requests initiated by the Administration shall be accompanied by a statement of the current authorized duties of the position(s) and any prospective changes. **(EC 45285)**
- C. The Personnel Commission shall authorize an overall classification study to be conducted as it may deem necessary and appropriate to maintain the integrity and internal alignment of the classification plan. However, individual positions may be reviewed, when needed, under the following conditions:
  - 1. The position has changed and the employee is performing new duties since the last time the position was studied (i.e. new technology or equipment, a new service being provided or a change in physical working conditions).
  - 2. The job description does not accurately reflect the duties presently being performed or the skills, knowledge and abilities required of the position.
  - 3. The position is performing a greater variety of tasks or higher level duties and not an increase in workload since the last classification study.
  - 4. The district has difficulty recruiting and retaining qualified employees.

Employees are asked to meet with the Personnel Director to determine whether or not their job description has been changed according to these guidelines. The Commission may authorize the study once the employee has met with the Director and reviewed the above conditions.

## DRAFT

### PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

#### Rules and Regulations for the Classified Service

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~~When an employee is reclassified upward, eligibility for further reclassification shall be in accordance with Rule 3.11 F.~~

For bargaining unit members, reclassification is subject to negotiations.

#### 3.13 Effective Date of Reclassification

- A. Reclassification of a position shall become effective on the date prescribed by the Commission and shall not have retroactive effect. Effective dates may be set as of the first day of the month following the date of the Commission's action, immediately, or it may must be set sufficiently in the future to allow time for examinations to be completed, but not more than ~~six~~ three months.
- B. When a group of positions, constituting one or more job families, are reclassified, the effective date of the reclassification may be determined by meet and negotiation between the Board's Representative and the Representative of the recognized employee group(s).

#### 3.14 Salary Placement After Reclassification

When a position is reclassified upward incumbents who are to be reclassified with the position shall be placed on the same step on the new range as they are on in the current range. If a person in a position being reclassified has not been in the position for a minimum of two years, and is reclassified following examination, the salary placement shall be treated as a promotion.

#### 3.15 Positions Requiring Multiple Languages

- A. The Board of Trustees may, with the approval of the Commission, designate positions which require the holder of the position to speak, read, and write a language in addition to English. The Commission shall then establish an appropriate class specific to the particular language requirement, if it does not already exist. **(EC 45277)**
- B. The Board must clearly set forth valid reasons for placing language requirements on a position.
- C. When a vacancy occurs in a position which has approved language requirements, the Board will notify the Commission that the need for language requirements continues to be a part of the position.

If a request from the Board to designate a position for language requirements is challenged, the Commission shall cause a proper investigation to be made and shall consider the findings and all other pertinent data presented by any concerned and responsible source prior to taking final action on the request

#### Chapter History:

Adopted December 1973

Revised March 1984

Revised September 2006

**DRAFT**

**PERSONNEL COMMISSION OF THE SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**  
Rules and Regulations for the Classified Service

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*Draft March 2015; April 2015*

# San Dieguito

## Union High School District

710 Encinitas Boulevard, Encinitas, CA 92024  
Telephone (760) 753-6491  
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**Board of Trustees**  
Joyce Dalessandro  
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Amy Herman  
Maureen "Mo" Muir  
John Salazar

**Superintendent**  
Rick Schmitt

**Classified Personnel Commission**  
John Baird, Commissioner  
David Holmerud, Commissioner  
Terry King, Commissioner  
Corrie Amador, Director

June 9, 2015

**TO:** Personnel Commission

**FROM:** Corrie Amador  
Director of Classified Personnel

**SUBJECT: Agenda Item #12 – Staff Comments on Personnel Activities**

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### **A. Vacancy Report**

There are 14 vacancies in 10 different classifications as detailed in the attached "Vacant Positions, 6/04/15" report.

### **B. Employment Listings**

Please see the Personnel Lists dated 5/21/15 and 6/4/15, submitted to the Board of Trustees for approval.



# SAN DIEGUITO UNION HIGH SCHOOL DISTRICT

## VACANT POSITIONS 6/04/15

Prepared for 6/09/15 Personnel Commission Meeting

Classified Personnel

14 current/pending vacancies in 10 different job classifications

Job Vacancy

Classes	Count	SITE	SLOT	JOB TITLE	Hrs/Wk	FTE	STATUS
1	1	FAC CON	AI128	Facilities Planning Analyst	40	1.00	Selection 6/04/15
2	2	TP	AA039	Administrative Secretary	40	1.00	Selection week of 7/13/15
3	3	SDA	AJ675	Theater Technician	40	1.00	Selection week of 7/13/15
4	4	DO	AJ896	Human Resources Technician	40	1.00	Selection week of 6/15/15
5	5	SDA Café	AA236	Nutrition Services Assistant I	12.5	0.31	Selection 6/15/15
	6	CV Café	AH037	Nutrition Services Assistant I	12.5	0.31	Selection 6/15/15
6	7	TRANS	AJ472	School Bus Driver	20	0.50	Continuous recruitment
	8	TRANS	AJ471	School Bus Driver	20	0.50	Continuous recruitment
7	9	SDA	AF900	Learning Commons Technician	40	1.00	Selection 7/23/15
8	10	DG	AA048	Administrative Secretary - Middle School	40	1.00	Selection week of 6/11/15
9	11	CV	AE928	Custodian	40	1.00	Selection 6/05/15
	12	OC	AA148	Custodian	40	1.00	Selection 6/05/15
	13	PTMS	AJ705	Custodian	40	1.00	Selection 6/05/15
10	14	FAC	AJ728	Custodian Floater	40	1.00	Selection week of 7/01/15

## PERSONNEL LIST

### CLASSIFIED PERSONNEL

#### Change in Assignment

1. **Crosby, Kalani**, from Instructional Assistant-SpEd(NS), SR34, 75.00% FTE, La Costa Canyon High School to Secretary, SR36, 100.00% FTE, Carmel Valley Middle School, effective 05/13/15.
2. **Graciano, Brent**, from Grounds Maintenance Worker I, SR35, 100.00% FTE, Facilities Department, to Grounds Maintenance Worker II, SR39, 100.00% FTE, effective 06/01/15.
3. **Rincon, James**, from Instructional Assistant-SpEd (SH), SR36, 75.00% FTE, Oak Crest Middle School to Grounds Maintenance Worker II, SR39, 100.00% FTE, Facilities Department, effective 04/27/15.

#### Leave of Absence

1. **Gutierrez, Stephanie**, Accounting Technician, SR42, 100.00% FTE, District Office-Finance Department, requests a 100.00% Unpaid Leave of Absence effective 04/27/15 through 07/17/15. Stephanie plans to resume her 100.00% assignment on 07/20/15.

#### Resignation

1. **Zuniga, Jamie**, Nutrition Services Assistant I, SR25, 48.75% FTE, Torrey Pines High School, resignation effective 05/15/15.

sj  
5/21/15  
classbdagenda

## PERSONNEL LIST

### CLASSIFIED PERSONNEL

#### Employment

1. **Helmen, Mary**, Instructional Assistant-SpEd(NS), SR34, 48.75% FTE, La Costa Canyon High School, effective 05/26/15.
2. **Martinez, Alex**, Custodian Floater, SR33, 100.00% FTE, Facilities Department, effective 06/03/15.

#### Change in Assignment

1. **Crain, Eric**, from Layoff-Warehouse/Stores Worker, SR39, 100.00% FTE to Grounds Maintenance Worker II, SR39, 100.00% FTE, Facilities Department, effective 6/1/15.
2. **Devers, Lamarr**, from Custodian, SR32, 100.00% FTE, Facilities Department-Carmel Valley Middle School to School Plant Supervisor-Middle School, SR39, 100.00% FTE, Pacific Trails Middle School, effective 6/1/15.
3. **Dubs, Debra**, from Administrative Secretary, SR40, 100.00% FTE, Nutrition Services to Secretary, SR36, 100.00% FTE, Oak Crest Middle School, effective 05/26/15.

#### Leave of Absence

1. **Anderson, Lara**, Instructional Assistant-SpEd(NS), SR34, 48.75% FTE, Earl Warren Middle School requests a 100.00% Unpaid Leave of Absence effective 05/14/15 through 06/12/15. Lara plans to resume her 48.75% assignment on 08/24/15.

#### Resignation

1. **LeFon, Mary**, Instructional Assistant-SpEd(SH), SR36, 75.00% FTE, Earl Warren Middle School-ATP, resignation for the purpose of retirement effective 06/12/15.
2. **Shultz, Jan**, Instructional Assistant-SpEd(SH), SR36, 75.00% FTE, Earl Warren Middle School-ATP, resignation for the purpose of retirement effective 06/12/15.

sj  
6/4/15  
classbdagenda



# SAN DIEGO COUNTY OFFICE OF EDUCATION

6401 Linda Vista Road, San Diego, CA 92111 • 858-292-3500 • www.sdcoe.net  
Randolph E. Ward, Ed.D., Superintendent of Schools

May 27, 2015

Ms. Corrie Amador  
Director, Classified Personnel  
San Dieguito Union High School District  
710 Encinitas Boulevard  
Encinitas, CA 92024-3357

Dear Ms. Amador:

In accordance with the provisions of Education Code 45253, the County Superintendent of Schools has approved the 2015-16 Personnel Commission budget for the San Dieguito Union High School District in the amount of \$300,704.

The budget submitted reflects a slight decrease over the Personnel Commission's 2014-15 final budget. If during the year, the school board approves any budget amendments for the Personnel Commission, please forward a copy of the changes to our office.

Also be reminded that San Dieguito Union High School District Governing Board should include the above amount of \$300,704 in the 2015-16 regular general fund adopted budget.

Sincerely,

Randolph E. Ward, Ed.D.  
County Superintendent of Schools

RW: BW: SR

cc: Eric Dill, Associate Superintendent/Business Manager, San Dieguito Union HSD  
Delores Perley, Chief Financial Officer, SDUHSD