



**PERSONNEL COMMISSION MEETING
AGENDA**

September 1, 2017

A special meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Friday, September 1, 2017**, at **12:00 p.m.**, the **District Administrative Offices**: 1651 16th Street, Santa Monica, CA.

I. General Functions:

- G.01 Call to Order
- G.02 Roll Call
- G.03 Pledge of Allegiance
- G.04 Report from Closed Session
- G.05 Approval of Agenda for Regular Meeting on September 1, 2017

Commissioner	M	S	Yes	No	Abstain	ABSENT
Barbara Inatsugu						
Peter Lippman						
Julie Waterstone						

- G.06 Public Comments



PERSONNEL COMMISSION MEETING AGENDA

Electronically Recorded (AUDIO ONLY)

September 1, 2017

PERSONNEL COMMISSIONERS: Mrs. Barbara Inatsugu, Mr. Peter Lippman,
and Mrs. Julie Waterstone

A special meeting of the Santa Monica-Malibu Unified School District Personnel Commission will be held on **Friday, September 1, 2017**, at **12:00 p.m.**, in the **District Administrative Offices:** 1651 16th Street, Santa Monica, CA.

- ❖ **Instructions on Public Comments:** Persons wishing to address the Personnel Commission regarding an item scheduled for this meeting must submit the "Request to Address" card before consideration of that item. Persons wishing to address the Personnel Commission regarding an item within the Commissions subject matter jurisdiction but not scheduled on this meeting's agenda may speak during the Public Comments section by submitting the "Request to Address" card before the Commission reaches that section of the agenda.

OPEN SESSION

I. GENERAL FUNCTIONS:

G.01 Call to Order:

G.02 Roll Call:

G.03 Pledge of Allegiance:

G.04 Report from Closed Session

G.05 Approval of Agenda for Special Meeting on September 1, 2017

G.06 Public Comments:

Public Comments is the time when members of the audience may address the Personnel Commission on items not scheduled on the meeting's agenda. All speakers are limited to five (5) minutes. When there is a large number of speakers, the Personnel Commission may reduce the allotted time to three (3) minutes per speaker. The Brown Act (Government Code) states that Personnel Commission members may not engage in discussion of issues raised during

If you will require an accommodation to participate in the Commission meeting, please notify the Personnel Commission Office at least 48 hours prior to the meeting.

“Public Comments” except to ask clarifying questions, make a brief announcement, make a brief report on his or her own activities, or to refer the matter to staff.

II. ACTION ITEMS:

These items are presented for ACTION at this time.

A.01 Classification Revision:

Approval of the revisions to the Director of Fiscal and Business Services classification within the Fiscal job family.

A.02 Salary Reallocation:

Approval of the salary reallocation to the Director of Fiscal and Business Services classification within the Fiscal job family.

A.03 New Classification:

Approval of the new classification Special Education Specialist within the Student Services job family.

A.04 Reclassification:

Approval of the reclassification for Ms. Jennifer Ingle from Administrative Assistant to Special Education Specialist.

III. NEXT REGULAR PERSONNEL COMMISSION MEETING:

Tuesday, September 12, 2017, at 4:30 p.m. – *District Office Board Room*

IV. ADJOURNMENT:

There being no further business to come before the Personnel Commission, it is recommended that the meeting be adjourned.

Submitted by:

Michael Cool
Secretary to the Personnel Commission
Director, Classified Personnel

If you wish to receive a full copy of the Personnel Commission Agenda Packet, please contact the Personnel Commission Office at (310) 450-8338, ext. 70-279.

II. Action Items:

Commissioner	M	S		Yes	No	Abstain	ABSENT
Barbara Inatsugu							
Peter Lippman							
Julie Waterstone							



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

PERSONNEL COMMISSION

Regular Meeting: Friday, September 1, 2017

AGENDA ITEM NO: II.A.01

SUBJECT: Class Description Revision – Director of Fiscal and Business Services

BACKGROUND INFORMATION:

Ms. Pat Ho, the current Director of Business and Fiscal Services, has held her position for over ten (10) years, and the job description has not been updated in that time. In anticipation of her retirement later this year, Executive Staff have requested that the job description be updated.

Personnel Commission staff intends to initiate a recruitment for this position in the near future. The District’s goal is to hire a new Director prior to Ms. Ho’s departure, to maximize overlap and ensure the new Director receives sufficient on-the-job training.

METHODOLOGY:

In carrying out this study, staff conducted the following activities:

- Met with the incumbent, Ms. Pat Ho, and the interim Assistant Superintendent – Business and Fiscal Services, Mr. Michael Bishop, to review the job description and receive feedback.
- Conducted market research to compare and contrast duties and minimum qualifications with other local Fiscal Directors.
- Performed a salary survey to determine if an increase or decrease in pay was warranted.

FINDINGS:

Based on analysis of the information gathered, the following changes were made:

- The Basic Function section was shortened. Deleted components were found elsewhere in the job description, so nothing was lost.
- References to Risk Management were removed, as this classification no longer provides oversight in that area.
- Duty statements remained largely the same. Duties on leadership, supervision, and collaboration were added and/or clarified.
- A few additions were made to the Knowledge section, including generally accepted accounting principles (GAAP).
- The overall format of the job description was updated using the most recent template. Basic Function and Minimum Qualifications are featured near the top, with Representative Duties that follow.

DIRECTOR’S RECOMMENDATION:

It is recommended that the Personnel Commission approve the revisions to the Director of Business and Fiscal Services classification description as provided.

Commissioner	M	S		Yes	No	Abstain	ABSENT
Barbara Inatsugu							
Peter Lippman							
Julie Waterstone							



CLASSIFICATION DESCRIPTION
BARGAINING UNIT: Non-Represented
CLASS CODE: 510919
SALARY RANGE: M-64

DIRECTOR – FISCAL AND BUSINESS SERVICES

BASIC FUNCTION:

Under the ~~broader~~general direction of the Assistant Superintendent of Business and Fiscal Services plans, organizes and directs the budget processing, attendance accounting, fiscal accounting, payroll, risk management, and internal control activities and functions of the District; ~~analyzes and resolves issues related to accounting, payroll and accounts receivable; performs financial research and analysis and presents reports to the Board of Education and other interested groups; supervises, trains and evaluates the performance of assigned staff.~~

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE:

~~Any combination equivalent to: bachelor's degree in accounting, business administration or a related field and five years increasingly responsible professional experience in business management, accounting and budget analysis, including at least three years in a supervisory capacity, preferably in a school district. A CPA certificate is desirable.~~

EDUCATION:

Graduation from college with a bachelor's degree in accounting, business administration, or related field. A CPA certificate is desired.

EXPERIENCE:

Five (5) years of increasingly responsible professional experience in business management, accounting and budget analysis, including at least three (3) years in a supervisory capacity. Experience within a K-12 school district is preferred.

LICENSES AND OTHER REQUIREMENTS:

Valid ~~California~~ Class C driver's license and use of a personal automobile.

REPRESENTATIVE DUTIES:

1. Provides leadership and direction and assumes management responsibility for the Fiscal and Business Services Department and activities including accounting, budgeting, and payroll.
- 4.2. Plans, organizes and directs a variety of activities and functions related to Fiscal Services including District budget processing, payroll, attendance accounting, fiscal accounting, cafeteria accounting, special projects accounting, and other fiscal programs; develops and implements procedures for internal control for various District programs; serves as an administrative financial officer for the District.
- 2.3. Assists the Assistant Superintendent – Business and Fiscal Services in the planning and preparation of the District's annual budget.
- 3.4. Administers programs for risk management, including self-insured plans for liability, workers' compensation, and employee, health and welfare benefits program.

- ~~4.5.~~ Analyzes and resolves issues related to attendance accounting, fiscal accounting, payroll, and accounts receivable, ~~and risk management.~~
- ~~5.6.~~ Provides prior and current year data from accounting records for the budgetary process; translates budget into controls for accounting systems to regulate financial stability.
- ~~6.7.~~ Supervises and participates in the annual closing of the accounting books.
- ~~7.8.~~ Provides for systems of internal control of various District fiscal programs including special internal audits as directed.
- ~~8.9.~~ Directs and participates in the selection, training, utilization and evaluation of staff; motivates and counsels staff; ~~Develops subordinate supervisors by pushing authority downward and outward throughout the department;~~ work with staff members to develop and improve upon skills and abilities.
- ~~9.10.~~ Establishes practices and controls for safe and efficient handling of District and student body funds, and financial and property records; establish reporting procedures of financial transactions.
- ~~10.11.~~ Directs the planning and organization of fiscal accounting and payroll systems.
- ~~11.12.~~ Provides needed business services for specially-funded educational programs in such areas as application preparation, budgeting, analysis, procurement, implementation and reimbursement.
- ~~12.13.~~ Acts as the primary financial advisor to the Assistant Superintendent – Business and Fiscal Services, providing technical expertise, information and assistance to maintain fiscal solvency and budget control; performs/conducts financial or statistical research or analytical studies to assist administration and the Board of Education in the formulation of policies and planning of new or revised programs; presents reports to the Board and other interested groups.
- ~~13.14.~~ Assumes a participating role on the District's financial committees.
- ~~14.15.~~ Prepares or directs the preparation and maintenance of a variety of financial, attendance, narrative and statistical reports, records and files related to assigned activities and personnel; review and sign District warrants.
- ~~15.16.~~ Communicates positively and effectively with other administrators, District personnel and contractors to coordinate activities and programs, to resolve issues and conflicts by finding alternative solutions to problems and to exchange information; answers questions and provides information on complex accounting questions; collaborates, informs, supports, and serves as a resource to executive management staff on various fiscal and business related matters.
- ~~16.17.~~ Develops and prepares the annual preliminary budget for Fiscal Services; analyzes and reviews budgetary and financial data; controls and authorizes expenditures in accordance with established limitations; reviews and verifies fund balances.
- ~~17.18.~~ Operates a computer and other office equipment in the preparation of correspondence, records, and reports.
- ~~18.19.~~ Attends and conducts a variety of meetings as assigned; prepares and presents reports for Board meetings related to the financial administration of the District as required.
- ~~19.20.~~ Assumes responsibility for special assignments as directed by the Assistant Superintendent – Fiscal and Business Services and acts for the Assistant Superintendent – Fiscal and Business Services in his/her absence.
- ~~20.21.~~ Perform related duties as assigned or as the situation requires.

NOTE: The statements listed above are intended to describe the general nature and level of work being performed by employees in this classification, and are not to be interpreted as an exhaustive list of responsibilities and qualifications required of personnel so classified. Reasonable accommodations will be made so that qualified employees can perform the essential functions of the job. The preceding functions have been provided as examples of the types of work performed by employees assigned to this job classification. Management reserves the right to add, modify, change and rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

SUPERVISION:

Supervision is received from the Assistant Superintendent of Business and Fiscal Services.

Supervision is exercised over Fiscal Services ~~and Risk Management~~ staff. Supervision of additional Business Services departments may be assigned by the Assistant Superintendent of Business and Fiscal Services.

KNOWLEDGE AND ABILITIES

KNOWLEDGE OF:

- Generally accepted accounting principles (GAAP).
- Governmental accounting procedures.
- California School Accounting Manual (CSAM).
- Planning, organization, and direction of the Fiscal Services of the District.
- Education codes, Merit rules, labor and other applicable laws, rules and regulations related to assigned functions.
- Principles and methods of modern public and business administration management.
- Techniques, practices and principles of school attendance accounting and fiscal accounting and payroll.
- Auditing principles and practices.
- Financial analysis and research procedures.
- Budget preparation and control.
- Automated and computerized financial systems in use in the District.
- Oral communication skills.
- Written communication skills.
- Principles and practices of administration, supervision and training.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Plan, organize, and administer the Fiscal Services of the District.
- Analyze and resolve issues related to accounting, payroll, or accounts receivable.
- Supervise and evaluate the performance of assigned staff.
- Develop staff training programs.
- Communicate effectively both orally and in writing.
- Interpret, apply, and explain rules, regulations, policies and procedures.
- Establish and maintain cooperative and effective working relationships with others.
- Operate a computer and assigned office equipment.
- Analyze situations accurately and adopt an effective course of action.
- Meet schedules and time lines.
- Work independently with little direction.
- Speak in front of large groups.
- Manage group processes.
- Manage conflict.
- Plan and organize work.
- Prepare comprehensive narrative and statistical reports.
- Direct the maintenance of a variety of reports and files related to assigned activities.

WORKING CONDITIONS:

ENVIRONMENT:

This position works in an office environment with frequent interruptions, moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Some work is performed off-site.

~~Office environment.~~

~~Driving a vehicle to conduct work.~~

PHYSICAL ABILITIES:

- Hearing and speaking to exchange information and make presentations.
- Seeing to read a variety of materials.
- Dexterity of hands and fingers to operate a computer keyboard.
- Sitting for extended periods of time while operating a computer.
- Bending at the waist, kneeling or crouching to file materials.

**DUTIES APPROVED
BOARD OF EDUCATION:**

**CLASSIFICATION APPROVED
PERSONNEL COMMISSION:**

Revision: 09/01/2017



PERSONNEL COMMISSION

Regular Meeting: Tuesday, September 1, 2017

AGENDA ITEM NO: II.A.02

SUBJECT: Salary Reallocation – Director of Fiscal and Business Services

BACKGROUND INFORMATION:

At the end of the 2015-2016 school year, all classified staff, both bargaining unit members and management, received a six percent (6%) salary increase that was retroactive to January 1, 2016. Certain classifications that were far below market median received an additional increase beyond (6%) by way of reallocation on the salary schedule. At the time the salary data was collected, the Director of Business and Fiscal services was found to be seven percent below (-7%) market median. At the time of the study, this salary discrepancy was not large enough to qualify for a reallocation. Thus, the classification was granted the six percent (6%) increase but remained at the original salary range (M-64).

Ms. Pat Ho, the incumbent Director of Business and Fiscal Services, has indicated that she plans to retire at the end of the 2017 calendar year. To ensure that Fiscal and Business operations continue without interruption, Personnel Commission staff are preparing to run the recruitment for this classification. Executive Staff requested that a salary study be performed to determine if the current salary is still competitive within the surrounding market.

METHODOLOGY:

The previous salary study compared the District's rate to thirty-two (32) school districts, community college districts, and municipalities in the local and extended markets. Within the current salary study, Personnel Commission staff were able to collect data from twenty-seven (27) of these agencies, twelve (12) within the local market, and fifteen (15) within the extended market.

Job descriptions and salary data were collected from each agency, and enrollment numbers were gathered from school districts. Classifications from other agencies were included in this salary study based on duties performed, minimum qualifications, and in some cases, organizational hierarchy.

The following statistics were computed: market median and average, SMMUSD distance from market median and average, and SMMUSD percentile rank.

FINDINGS:

Based on analysis of the information gathered, the findings are as follows:

- When compared to all agencies within the local and extended market, the Director of Fiscal and Business Services is 10% below market average, and 9% below market median. SMMUSD's percentile rank is 26%, meaning that 74% of the sampled agencies have higher salaries with respect to this classification.

- When limiting the comparison to local market K-12 districts of similar size only, SMMUSD is at market median.

Agency	Area	Director Fiscal Services					
		Class Title	Enrollment	Min Step	Max Step	Education	Experience
Santa Monica Malibu USD	*	Director Fiscal and Business Svcs	11,005	\$8,680	\$10,552	4.0	5.0
City of Santa Monica	Local	Accounting Manager		\$10,946	\$13,513	4.0	4.0
Conejo Valley USD	Local	Director, Fiscal Services	18,918	\$8,228	\$10,505	4.0	4.0
Culver City USD	Local	Director - Accounting and Budgeting	6,856	\$9,212	\$10,773	4.0	3.0
Hawthorne USD	Local	Director of Fiscal	8,573	\$7,353	\$9,889	4.0	5.0
Los Angeles USD	Local	Fiscal Oversight Administrator	633,621	\$8,462	\$10,544	4.0	5.0
Manhattan Beach USD	Local	Director of Fiscal Services	6,776	\$9,121	\$11,098	4.0	5.0
Oxnard USD	Local	Director of Finance	16,822	\$8,951	\$10,634	4.0	5.0
Palos Ver Pen USD	Local	Director, Fiscal Services	11,428	\$9,482	\$11,518	4.0	5.0
Pleasant Valley USD	Local	Director Finance	7,284	\$7,555	\$9,182	4.0	5.0
Redondo Beach USD	Local	Director-Fiscal Svcs	9,788	\$8,228	\$10,575	4.0	5.0
Santa Monica College	Local	Director of Fiscal Services	30,159	\$12,610	\$13,902	4.0	6.0
Torrance USD	Local	Fiscal Services Officer	23,696	\$14,769	\$14,769	4.0	3.0
Anaheim UHSD	Extended	Controller	30,964	\$10,179	\$11,459	4.0	7.0
Burbank USD	Extended	Director of Fiscal Services	16,104	\$8,652	\$11,594	4.0	
Downey USD	Extended	Sr. Director, Budget and Finance	22,303	\$10,655	\$12,949	4.0	5.0
Fountain Valley USD	Extended	Director Fiscal Services	6,387	\$8,504	\$10,827	4.0	4.0
Garden Grove USD	Extended	Director of Business Services	44,223	\$9,662	\$11,773	4.0	5.0
Glendale USD	Extended	Director, Financial Services	26,075	\$8,754	\$11,731	4.0	4.0
Huntington Beach UHSD	Extended	Director, Fiscal Services	16,140	\$11,546	\$13,018	4.0	5.0
Long Beach USD	Extended	Executive Director - Fiscal Services	76,428	\$10,959	\$12,869	4.0	6.0
Lynwood USD	Extended	Director, Fiscal Svcs	14,497	\$9,418	\$11,444	4.0	4.0
Montebello USD	Extended	Director of Fiscal Services*	27,398	\$9,988	\$12,185	4.0	3.0
Newport-Mesa USD	Extended	Administrative Director II, Fiscal Svcs	21,581	\$11,592	\$14,104	4.0	8.0
Pasadena USD	Extended	Director, Budget	18,410	\$9,785	\$10,300	4.0	7.0
Westminster USD	Extended	Director, Purchasing and Financial Svcs	9,338	\$10,381	\$11,856	4.0	5.0
Simi Valley USD	Extended	Director, Fiscal Services	17,149	\$9,342	\$10,323	4.0	6.0
Ventura USD	Extended	Director-Budget & Finance	16,981	\$7,969	\$9,984	4.0	5.0
		Market Average	43,765	9,715	11,604	4	5
		Market Median	17,065	9,418	11,459	4	5
		Market Range	627,234	7,416	5,587	-	5
		% SMMUSD is from Market Average		-12%	-10%		
		% SMMUSD is from Market Median		-9%	-9%		
		SMMUSD Percentile Rank		30%	26%		

DISCUSSION

When consideration is narrowed to K-12 districts of similar size within the local market, SMMUSD's salary is at median. From this perspective, it may not seem like a salary increase is needed. However, when recruiting for this position, the District will be competing with both local and extended markets, and thus will need to attract applicants near and far. Another compounding factor is that the work location is located in an area that makes for a notoriously difficult commute. Therefore, an upward salary reallocation is recommended for this classification, to bring the range from M-64 (\$8,680 - \$10,552) to M-68 (\$9,581 - \$11,647). This is a 10% increase which will bring the salary to 1% above market median. The following table contains the salaries of other classified directors and upper level management.

Class Title	Salary Range	Min Step	Max Step
Chief Operations Officer	76	\$11,673.00	\$14,189.00
Director of Fiscal/Business Services (proposed)	68	\$9,581.00	\$11,647.00
Director of Classified Personnel	64	\$8,680.00	\$10,552.00
Director of Fiscal/Business Services (current)	64	\$8,680.00	\$10,552.00
Director of Information Services	64	\$8,680.00	\$10,552.00
Director of Maintenance & Operations	63	\$8,469.00	\$10,295.00
Community & Public Relations Officer	62	\$8,263.00	\$10,042.00
Director of Food Services	59	\$7,672.00	\$9,325.00
Director of Purchasing & Warehouse	59	\$7,672.00	\$9,325.00
Director of Transportation Services	57	\$7,302.00	\$8,878.00

DIRECTOR'S RECOMMENDATION:

It is recommended that the Personnel Commission approve salary reallocation of Director of Fiscal and Business Services from M-64 (\$8,680 - \$10,552) to M-68 (\$9,581 - \$11,647).

Commissioner	M	S	Yes	No	Abstain	ABSENT
Barbara Inatsugu						
Peter Lippman						
Julie Waterstone						



PERSONNEL COMMISSION

Regular Meeting: Friday, September 1, 2017

AGENDA ITEM NO:II.A.03

SUBJECT: Proposed New Classification – Special Education Specialist

BACKGROUND INFORMATION:

A request for reclassification was submitted for Ms. Jennifer Ingle, Administrative Assistant in the Special Education Department, on May 31, 2016. A position study was initiated and it was found that Ms. Ingle performs various duties that are not within the Administrative Assistant job description, nor within any other classification currently established. The proposed classification of Special Education Specialist represents the unique duties that Ms. Ingle performs, and the changing needs of the Special Education Department.

METHODOLOGY:

In carrying out this study, staff conducted the following activities:

- Held multiple meetings and informational interviews with the Administrative Assistant in the Special Education Department to determine the duties being performed.
- Received input from the Director of Special Education in clarifying and revising task statements, and required knowledge, skills and abilities.
- Reviewed the organizational structure of the department and other District classifications that may have comparable or overlapping duties.
- Researched, collected, and reviewed related job descriptions from other school districts within our local and extended market. Data was used to construct task statements, and knowledge and abilities statements.
- Collected salary data to determine appropriate salary allocation.

ANALYSIS:

- Clarified, defined, and operationalized all task statements by obtaining input from department personnel, Director of Special Education, and comparable classifications from surrounding districts.
- Analyzed salary of comparable classifications with similar representative duties. Although there were several related positions within the local and extended market, many were not directly comparable. Three (3) positions were identified as sufficiently similar and were included in the analysis.

District	Class Title	Education	Experience	Min Step	Max Step
SMMUSD	Special Education Specialist	HS	3 years	\$3,469.00	\$4,428.00
Lynwood USD	Special Education Technician	HS	2 yrs incl. 1 yr school district	\$3,364.00	\$4,100.00
Burbank USD	Special Education Technician	HS + college coursework	2 yrs	\$3,289.00	\$4,214.00
Torrance USD	Staff Assistant - Special Education	HS + college coursework	2 yrs incl. 1 yr school district	\$3,899.00	\$4,739.00
				Average	\$3,517.33
				Median	\$3,364.00

FINDINGS:

Based on the information and data collected, the Personnel Commission’s findings are as follows:

- There is a need in the Special Education Department for a classification that performs duties outside the scope of an Administrative Assistant. Specifically, the Special Education Specialist will:
 - Initiate and complete contracts and service agreements for non-public school students, ensuring compliance with District insurance, applicable laws, budgetary restrictions, Special Education Local Plan Area (SELPA) rates, etc.
 - Engage with independent contractors, service providers, vendors, etc. to revise terms of contracts and agreements, and ensure the Director is presented with the best possible rates for final approval.
 - Support the Director in various legal matters and proceedings by collecting and preparing relevant information.
 - Compose settlement agreements and contract summaries, and ensure payment of fees and reimbursements.
- Of the three (3) comparable classifications identified, the average salary at the minimum step was \$3,517, and the average maximum step was \$4,351. Taking both of these averages into consideration, salary range A-34 (\$3,469 – \$4,428) is being recommended.

DIRECTOR’S RECOMMENDATIONS:

Establish the classification of Special Education Specialist to meet the needs of the Special Education Department. Based on a salary study of similar positions, the recommended salary range is A-34 (\$3,469 – \$4,428).

Commissioner	M	S	Yes	No	Abstain	ABSENT
Barbara Inatsugu						
Peter Lippman						
Julie Waterstone						



CLASSIFICATION DESCRIPTION

BARGAINING UNIT: SEIU Local 99
Office, Technical and Business Services
CLASS CODE: ???
SALARY RANGE: A-34 (Proposed)

SPECIAL EDUCATION SPECIALIST

BASIC FUNCTION

Under general supervision, perform a variety of technical and clerical tasks requiring independent judgment and the application of specialized knowledge in support of the Special Education Department; collect information, propose, and enforce terms and conditions of multiple contracts in support of department operations; provide information and assistance to parents, school staff and outside agencies related to Special Education students, programs and activities.

MINIMUM QUALIFICATIONS

EDUCATION:

Must have a high school diploma or its recognized equivalent.

EXPERIENCE:

Three (3) years of varied administrative, secretarial, and clerical support experience, including preparing and monitoring contracts with service providers. Experience with legal processes pertaining to Special Education is desired.

REPRESENTATIVE DUTIES

1. Perform a variety of complex clerical and secretarial duties in support of Special Education operations; assist the Director in resolving a variety of problems associated with a diverse Special Education program; ensure timely communications between the department, parents, students and employees; collect, and organize data and information on behalf of the Director; generate, prepare, and revise a variety of documents, reports, and other material for the approval of the Director.
2. Schedule and coordinate a variety of meetings, workshops, hearings, conferences, and trainings; prepare and send notices of meetings; compile information and generate reports, memos, agendas and minutes, maintain Special Education Department Master Calendars.
3. Develop and maintain a working knowledge of terminology related to the Special Education Department; maintain an understanding of the programs and functions of the department, and their relation to the District as a whole.
4. Coordinate communications and provide technical information in person and on the telephone concerning procedures and guidelines related to special education programs; respond to inquiries as requested; provide information related to department activities to parents, employees, students, and outside agencies under guidance of the Director.
5. Perform a variety of records management and data control duties under guidance of the Director; maintain confidentiality of records; create, update, and maintain a variety of logs, records, and files; enter and retrieve data from student information systems and databases such as Special Education Information System (SEIS), Illuminate, and Board Document system.
6. Provide work direction to clerical office staff; ensure efficient flow of information and office productivity; and oversee various department processes and special projects, serving as central point of contact between clerical office staff, Special Education Coordinators, Director, and other internal and external entities.
7. Coordinate and facilitate communications and serve as liaison with the Transportation Department to ensure appropriate transportation for special education students; coordinate logistics with taxi agencies including licensing and clearance, pick-up and drop-off locations, routes and schedules, emergency contact information, and ensuring appropriate seating and safety; communicate and update parents with

- transportation logistics; arrange for Paraeducators to travel with students under guidance of the Director; review invoices and verify charges from taxi agencies.
8. Initiate and complete contracts and service agreements for Nonpublic school students in special education programs in accordance with SELPA negotiated rates and other industry standard guidelines, District insurance, health, and safety terms, legal compliance, department and district standards and budgetary restrictions; communicate with the Director and review agreements with nonpublic and private schools and agencies, and independent contractors, for revision to terms; gain input and approval from Director of Special Education and/or SELPA Director on finalized rates and terms.
 9. Verify and process invoices for Nonpublic school students, Nonpublic Agencies, Independent Contractors, and Parent Reimbursements in collaboration with the Accountant; verify student absences, rate charges, calculations; track attendance and expenses to ensure contract cost is not exceeded.
 10. Support the Director in various legal matters and litigation; collect relevant student information in preparation for legal proceedings by accessing information systems, databases, and department logs and files; collect information from Special Education Data Technician, teachers, members of the IEP team, and Student Services Department; schedule and make logistical arrangements to formal courtroom specifications.
 11. Compose settlement agreement and contract summaries for presentation to the Board of Education; maintain electronic files and case log related to legal outcomes, within databases, spreadsheets and electronic Board documents.
 12. Submit contracts and service agreements for settlement agreements to Board of Education for approval; clarify payment guidelines and process invoices; ensure all fees and reimbursements are paid in a timely manner under guidance of the Director.
 13. Perform other related duties as assigned.

NOTE: *The statements listed above are intended to describe the general nature and level of work being performed by employees in this classification, and are not to be interpreted as an exhaustive list of responsibilities and qualifications required of personnel so classified. Reasonable accommodations will be made so that qualified employees can perform the essential functions of the job.*

SUPERVISION

Supervision is received from the Director of Special Education. Technical and functional work direction is provided to clerical staff.

KNOWLEDGE AND ABILITIES

KNOWLEDGE OF:

- Terminology, records management, legal processes and procedures specific to Special Education
- Word-processing, database, document management, spreadsheet and application programs
- Student information systems
- Online calendar systems
- Google documents and functions
- E-mail systems
- Budgeting and basic accounting procedures
- General business protocols and norms
- Relevant provisions of Education Code and other applicable laws
- Principles and practices of quality customer service

ABILITY TO:

- Investigate and request information regarding Special Education, contracts, and legal processes from internal and external sources
- Communicate effectively, orally and in writing with a variety of internal and external contacts
- Compile, tabulate, and analyze data
- Schedule, organize, and complete work in accordance with deadlines
- Use independent judgment and initiative to carry out department and District needs
- Work cooperatively with others
- Work independently
- Demonstrate flexibility and respond to changing requirements and job assignments

WORKING CONDITIONS

ENVIRONMENT:

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with school administrators, program coordinators, and educational agency representatives in preparing reports, reviewing accounting activities, and requesting and providing information. The employee also interfaces with a range of different managers, supervisors, staff, students, and public and private representatives.

PHYSICAL ABILITIES:

Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. The position occasionally bends, stoops, reaches, pushes and pulls drawers to retrieve and file information, and lifts and carries reports and records that typically weigh less than 20 pounds.

***DUTIES APPROVED
BOARD OF EDUCATION:***

08/30/2017

***CLASSIFICATION APPROVED
PERSONNEL COMMISSION:***

Created: 09/01/2017

DRAFT



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

PERSONNEL COMMISSION

Special Meeting: Friday, September 1, 2017

AGENDA ITEM NO: II.A.04

SUBJECT: Reclassification Study – Administrative Assistant for Jennifer Ingle

BACKGROUND INFORMATION:

The Personnel Commission received a reclassification request from the incumbent Administrative Assistant in the Special Education Department on May 31, 2016 and an investigation was initiated to determine if the current classification description accurately reflects the duties being performed. Ms. Ingle has held her current position since she joined the District in April 2013.

Special Education is a large, complex, and dynamic department which provides services to students between the ages of three (3) and twenty-two (22) who have a disabling condition. Our District partners with Beverly Hills USD and Culver City USD as part of the Special Education Local Plan Area (SELPA). The SELPA provides access to special education programs and services for all students with exceptional needs residing in the area, not just those who attend SMMUSD schools.

District Office management for Special Education consists of the Director, four (4) Coordinators, and two (2) Behavioral Intervention Specialists. Ms. Ingle reports directly to the Director, Ms. Pam Kazee.

METHODOLOGY:

In carrying out this study, staff conducted the following activities:

- Reviewed the Position Information Questionnaire submitted to the Personnel Commission by Jennifer Ingle.
- Reviewed the classification specifications for Administrative Assistant, Senior Administrative Assistant, other positions within Special Ed, and comparable classifications at nearby districts.
- Held multiple meetings and informational interviews with Ms. Ingle and her Director, Ms. Kazee.

ANALYSIS:

- Analyzed tasks to identify which tasks were an essential part of the job function.
- Created task matrix with related classifications for purpose of comparison.
- Reviewed and analyzed information collected during the interviews with incumbent and supervisor.

FINDINGS:

Based on the data collection analysis, the Personnel Commission found that Ms. Ingle was performing duties outside of her classification, primarily her role in initiating and adjusting contracts, and negotiating rates. Although some of the tasks and responsibilities below were later reassigned to other personnel in the Special Education Department, at the time information was initially gathered, Ms. Ingle was performing the following duties:

- Initiates Master Contracts and Individual Service Agreements in accordance with Greater Los Angeles Area SELPA (GLAAS) negotiated rates. Independently engages in further negotiations with vendors and providers. Collects information from surrounding districts for cost comparison, inquire whether vendors can honor rates from previous contracts, and other strategies to reduce costs.
- Initiates Master Contracts and Independent Contracts in accordance with GLAAS and District insurance terms. Further negotiates with non-public and private schools and agencies, and independent contractors for revision to terms.
- Adjusts contracts throughout the year as Individualized Education Program (IEP) services or other terms change.
- Coordinates taxi routes for student transportation and writes individual contract for each student. Coordinates all logistics related to taxis including: verifying routes, scheduling pick-up and drop-off times, ensuring paraprofessional support is available, collect and negotiate rates with several companies, and obtain TB and Livescan clearances for drivers.
- Processes student reimbursements under contract for therapeutic care at residential treatment centers. Review receipts, invoices, and proof of payment to ensure compliance with departmental guidelines.

DISCUSSION

Ms. Ingle joined the District at a time when the Special Education Department was transitioning between an outgoing and incoming Director. Roles and responsibilities may not have been firmly established, and Special Education personnel did what was required to ensure continuity of programs and services for students in need. During this time, Ms. Ingle began to take on more and more duties, some of which are not within the Administrative Assistant classification.

Prior to this formal recommendation, management scaled back some of Ms. Ingle’s contract responsibilities, such as negotiating rates and interpreting content within the IEPs. However, it is still determined that Ms. Ingle’s overall role and responsibility with initiating and overseeing contracts is outside of the Administrative Assistant Classification.

DIRECTOR’S RECOMMENDATION:

Ms. Ingle should be reclassified into the newly created classification of Special Education Specialist, and receive retroactive pay for working out of class starting on June 1, 2016.

Commissioner	M	S		Yes	No	Abstain	ABSENT
Barbara Inatsugu							
Peter Lippman							
Julie Waterstone							

III. Next Regular Personnel Commission Meeting:

Tuesday, September 12, 2017, at 4:30 pm, *District Office Board Room*

IV. Adjournment: