

## Human Resources Review

July 22, 2022



# Clovis Unified School District

Michael H. Fine  
Chief Executive Officer

July 22, 2022

Eimear O'Brien, Ed.D., Superintendent  
Clovis Unified School District  
1450 Herndon Avenue  
Clovis, CA 93611

Dear Superintendent O'Brien:

In February 2022, the Clovis Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the Human Resources Division, including the Benefits Department. The agreement stated that FCMAT would perform the following:

1. Conduct an organizational and staffing review of the Human Resources Division, including the Benefits Department and make recommendations for staffing improvements, increases or reductions, if any.
2. Review the operational processes and procedures used by the Benefits Department and make recommendations for improved efficiency, if any.

This final report contains the study team's findings and recommendations. FCMAT appreciates the opportunity to serve the Clovis Unified School District and extends thanks to all the staff for their assistance during fieldwork.

Sincerely,



Marcus Wirowek, CFE  
Intervention Specialist

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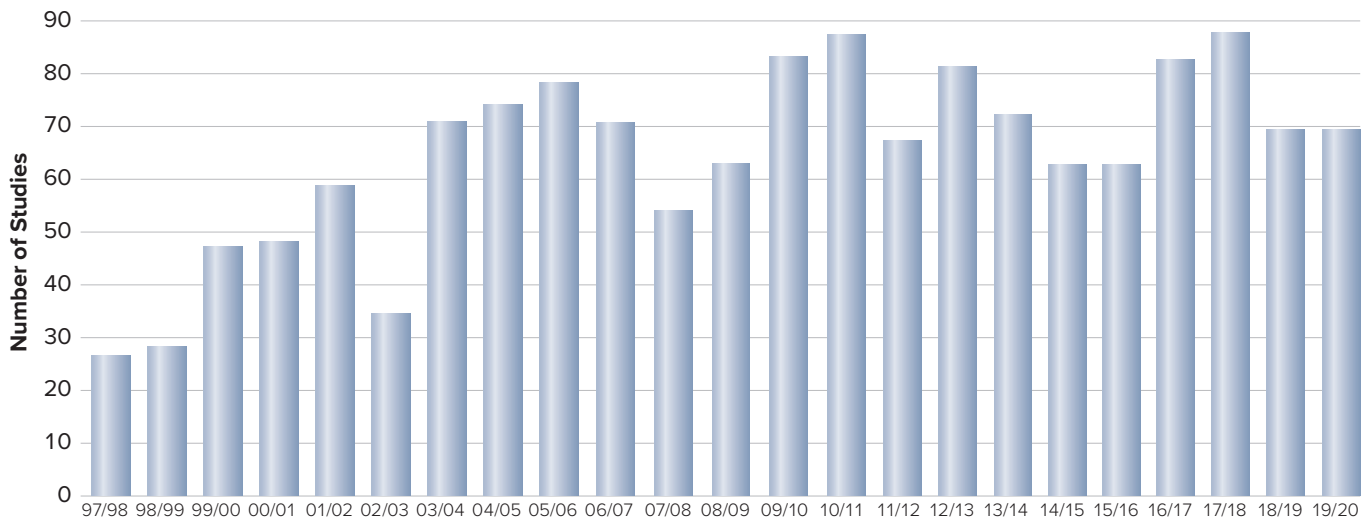
# About FCMAT

FCMAT’s primary mission is to assist California’s local K-14 educational agencies to identify, prevent, and resolve financial, human resources and data management challenges. FCMAT provides fiscal and data management assistance, professional development training, product development and other related school business and data services. FCMAT’s fiscal and management assistance services are used not just to help avert fiscal crisis, but to promote sound financial practices, support the training and development of chief business officials and help to create efficient organizational operations. FCMAT’s data management services are used to help local educational agencies (LEAs) meet state reporting responsibilities, improve data quality, and inform instructional program decisions.

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

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

### Studies by Fiscal Year



FCMAT has continued to make adjustments in the types of support provided based on the changing dynamics of K-14 LEAs and the implementation of major educational reforms. FCMAT also develops and provides numerous publications, software tools, workshops and professional learning opportunities to help LEAs operate more effectively and fulfill their fiscal oversight and data management responsibilities. The California School Information Services (CSIS) division of FCMAT assists the California Department of Education with the implementation of the California Longitudinal Pupil Achievement Data System (CALPADS). CSIS also hosts and maintains the Ed-Data website ([www.ed-data.org](http://www.ed-data.org)) and provides technical expertise to the Ed-Data partnership: the California Department of Education, EdSource and FCMAT.

FCMAT was created by Assembly Bill (AB) 1200 in 1992 to assist LEAs to meet and sustain their financial obligations. AB 107 in 1997 charged FCMAT with responsibility for CSIS and its statewide data management work. AB 1115 in 1999 codified CSIS’ mission.

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

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

On September 17, 2018 AB 1840 was signed into law. This legislation changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting the former state-centric system to be more consistent with the principles of local control, and providing new responsibilities to FCMAT associated with the process.

Since 1992, FCMAT has been engaged to perform more than 1,400 reviews for LEAs, including school districts, county offices of education, charter schools and community colleges. The Kern County Superintendent of Schools is the administrative agent for FCMAT. The team is led by Michael H. Fine, Chief Executive Officer, with funding derived through appropriations in the state budget and a modest fee schedule for charges to requesting agencies.

# Introduction

## Background

Located in Fresno County, the Clovis Unified School District has a seven-member governing board and serves approximately 42,790 students at 34 elementary schools, five intermediate schools, and five high schools. The district has authorized one district-operated charter school. One independent charter school also operates within the district's boundaries, authorized by the Fresno County Superintendent of Schools. According to data from the California Department of Education, the district's student enrollment peaked at 43,654 in 2019-20. An 864-student decrease in 2020-21 is the first time in the last 12 years that the district has experienced declining enrollment.

The district's California Longitudinal Pupil Achievement Data System (CALPADS) records indicate that the 2020-21 unduplicated pupil count (the number of students who are English learners, foster youth, or qualify for free or reduced-price meals) is 23,961, or 56% of enrollment.

## Study and Report Guidelines

In February 2022, the Clovis Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct an organizational and staffing review of the district's Human Resources Division, including the Benefits Department and review operational processes and procedures of the district's Benefits Department.

The district collected and provided documents to FCMAT before FCMAT conducted interviews with district personnel. The FCMAT study team conducted onsite interviews on April 4-5, 2022. Following this and other fieldwork, FCMAT continued to review and analyze documents. This report is the result of those activities.

FCMAT's reports focus on systems and processes that may need improvement. Those that may be functioning well are generally not commented on in FCMAT's reports. In writing its reports, FCMAT uses the Associated Press Stylebook, a comprehensive guide to usage and accepted style that emphasizes conciseness and clarity. In addition, this guide emphasizes plain language, discourages the use of jargon and capitalizes relatively few terms.

## Study Team

The study team was composed of the following members:

Marcus Wirówek, CFE  
FCMAT Intervention Specialist

Alyssa Low  
FCMAT Consultant

Laura Haywood  
FCMAT Technical Writer

Each team member reviewed the draft report to confirm accuracy and achieve consensus on the final recommendations.

## Executive Summary

A school district should be staffed according to the basic theories of organizational structure used in other school agencies of similar size and type, and its structure should reflect generally accepted theories, which include span of control, chain of command, and line and staff authority.

An organizational chart shows an organization's structure and the relationship of all positions to one another and is needed to identify the chain of command and the functional areas of each staff member. The district's 2021-22 organizational chart does not clearly show the chain of command and functional areas of responsibility or the structure and relationships between positions.

A review and comparison with comparable districts indicates that the district's Human Resources and risk and benefits departments are significantly understaffed. Under the district's current structure, the risk and benefits department resides within the Human Resources and employee relations department. The district should consider hiring additional staff.

The distribution and assignment of work to the human resources (HR) specialists is not equitable, as staff reported that one HR specialist could have 30-35 positions in a month in various stages of onboarding with another managing 10-15 a month.

There is little to no overlap in the HR analyst functions of credentials and human resources information systems (HRIS). The two employees who perform these functions are not adequately cross trained. If the employee with the knowledge of credentials were to leave, the other HR analyst could have difficulty fulfilling the credentials function and ensuring the district remains compliant.

The HR department appears to have a practice of assigning similar levels of work to two different classifications. For example, leaves of absence (LOAs) have been assigned to an HR specialist, who processes certificated LOAs, and to the administrative assistant of the chief human resources officer (CHRO), who processes classified LOAs. To compensate the administrative assistant for the higher-level functions, the district reclassified the position to a department office supervisor. According to the district's job description, the department office supervisor classification is typically assigned to high schools as they perform "secretarial and clerical duties for a Principal of a high school ..."

The risk and benefits manager conducts Title IX investigations because the human resources director position is vacant. However, the risk and benefits department is relatively new, and the Title IX investigations prevent its manager from focusing solely on the risk and benefits functions. Title IX investigations should be handled by the director of human resources and/or the CHRO.

As mentioned in FCMAT's review of Clovis USD's Budget & Finance department, the district struggles with automating processes. According to interviews with HR department staff, duplicative manual entries are made in the district financial system, MUNIS. The automation of routine, manual processes, no matter how small or how few staff are affected, increases productivity, freeing time for staff to perform other duties.

# Findings and Recommendations

## Organizational Structure

A school district's organizational structure establishes the framework for leadership and the delegation of specific duties and responsibilities for all staff members. As a district's enrollment increases or declines, the organizational structure should adapt as needed to the changes. School districts should be staffed according to the basic theories of organizational structure and the standards used in other school agencies of similar size and type. The most common theories of organizational structure are span of control, chain of command, and line and staff authority.

### Span of Control

Span of control refers to the number of subordinates who report directly to a supervisor. Although there is no agreed upon ideal number of subordinates for span of control, the span can be larger at lower levels of an organization than at higher levels because subordinates at lower levels typically perform more routine duties and therefore can be more efficiently supervised (*Principles of School Business Management* by R. Craig Wood, David C. Thompson, Lawrence O. Picus and Don I. Tharpe).

### Chain of Command

Chain of command refers to the flow of authority in an organization. Chain of command is characterized by two guiding principles: unity of command, meaning that a subordinate is accountable to only one supervisor, thus eliminating the potential for an employee to receive conflicting direction and instruction from a variety of supervisors; and the scalar principle, meaning that subordinates at every level in the organization follow the chain of command and only communicate through their immediate supervisor. The result is a hierarchical division of labor in the organization.

### Line and Staff Authority

Line authority is the relationship between supervisors and subordinates and refers to the direct line in the chain of command. For example, in the Clovis Unified School District, the superintendent has direct line authority over the deputy superintendent, and the deputy superintendent has direct line authority over the associate superintendent of human resources and employee relations. Conversely, staff authority is advisory. Staff personnel do not have the authority to make and implement decisions; rather, they act in support roles to line personnel. The organizational structure of local educational agencies has both line and staff authority.

The purpose of any organizational structure is to help district management make key decisions to facilitate student learning while balancing staff levels. The organizational design should outline the management process and its specific links to the formal system of communication, authority and responsibility needed to achieve the district's goals and objectives. Authority in a public school district originates with the elected governing board, which hires a superintendent to oversee the district. Through the superintendent, authority and responsibility are delegated to the district's administration and staff.

Management positions are typically responsible for supervising employees and overseeing the work of their respective divisions. They must ensure that staff members understand all district policies and

procedures and perform their duties in a timely and accurate manner. A manager must also serve as a liaison between their division and others to identify and resolve problems and design and modify processes and procedures as needed. Management positions should typically not be responsible for a division's routine daily functions; these should be assigned to division support staff.

# Department Organizational Structure

The district provided FCMAT with the 2021-22 organizational chart that did not clearly show the chain of command and functional areas of responsibility or the structure and relationships between positions. An organizational chart should clearly identify key areas of authority, function, and responsibility.

Based on interviews with district staff, the Human Resources and employee relations department is composed of four divisions: credentials, employee recruitment processing/onboarding, substitute recruitment (classified and certificated), and risk and employee benefits. The department is overseen by the associate superintendent of human resources and employee relations and a CHRO position. A human resources director position is vacant.

Although not indicated on the district supplied organizational chart, credentials has a human resources analyst and a human resources specialist responsible for processing and maintaining the district's certificated staff credentials. Employee leave of absence duties are split between two different classifications: an HR specialist and a department office supervisor.

There is a human resources analyst and eight full-time equivalent (FTE) human resources specialists who are responsible for employee recruitment processing/onboarding. The main function of the HR specialist is to enter and process new employee information into the district's HRIS and MUNIS systems. Most of the district's recruitment efforts are decentralized to the various school sites and departments, with appropriate oversight by the Human Resources department to ensure all relevant law and board policy is followed.

A human resources systems operator, a human resources recruiter, a human resources assistant I and a human resources assistant II handle substitute recruitment. Clovis currently uses a retiree, on a part time basis, to perform the functions of the human resources recruiter position. Since the position is filled by a retiree, FCMAT assumes that it is not a full-time (1.0 FTE) allocated position. Therefore, it is not included in the overall department FTE calculation.

The newly established Risk and Benefits department has a risk and benefits manager, a benefits analyst, benefits technician and a benefits assistant. This department handles all the district's workers' compensation claims, risk management and the health insurance program, which includes a medical site specifically for the district called miCare Health Center. MiCare provides general health care services to employees and retirees covered by the district's health plan, including their dependents. Operated by miCare, the Clovis Unified Employee Health Center is staffed with board certified physicians and other health care providers who assist employees and their dependents with their general health needs. The risk and benefits manager also performs some duties of the vacant human resources director position.

Below is a chart reflecting the current staffing allocation to the Human Resources Division, which includes the Benefits Department.

### Human Resources & Risk and Benefit Department Allocated Staff Positions

Position Title	Full-Time Equivalent (FTE)
Associate Superintendent, Human Resources & Employee Relations	1.0
Chief Human Resources Officer	1.0
Human Resources Director	1.0
Risk & Employee Benefits Manager	1.0
Executive Assistant	1.0
Department Office Supervisor	1.0
Human Resources Analyst	2.0
Benefits Analyst	1.0
Human Resources Specialist	9.0
Benefits Technician	1.0
Human Resources System Operator	1.0
Human Resources Assistant I	1.0
Human Resources Assistant II	1.0
Benefits Assistant	1.0
<b>Total</b>	<b>23.0</b>

To ensure consistent and effective performance by the department and its employees, the district needs to update its job descriptions that clearly identify essential and other functions and duties for each position in each division. The best practice is to review job descriptions annually and present them to the governing board for approval if changes are necessary. The district's HR job descriptions are not sufficient and do not establish key areas of authority, function, and responsibility.

Of concern is that the HR department has inappropriate descriptions or classifications for its own employees. As the oversight department in this area, HR needs to ensure that all district job descriptions are kept current so that employees fulfill responsibilities that are appropriate to their position.

## Recommendations

*The district should:*

1. Update the organizational chart to reflect the chain of command, functional areas of responsibility, and the structure and relationship between positions.
2. Ensure the organizational chart reflects to whom the employees report.
3. Develop an annual plan to ensure job descriptions remain updated, relevant, and compliant with the law.
4. Ensure that similar or identical work functions are assigned to the same classification and included in the job description.
5. Ensure the district and retirees follow CalPERS/CalSTRS publications regarding retirees working after retirement.

# Human Resources Specialist

The HR specialist job description states that this position performs a variety of advanced technical and professional work in support of the Human Resources department. Duties include processing personnel status transactions, managing and overseeing recruitment, assisting with the interview process, training and orientation, development and maintenance of personnel files, employee communications, and state and local reporting. The HR specialist position salary range is 119, and the job description was last board approved on July 2, 2013, and reviewed on July 13, 2017.

The HR specialist reports to human resources management. No current department position has the title of human resources management. At the time of FCMAT's interviews the department had a director of human resources; however, the director position is now vacant. The associate superintendent of human resources and employee relations and the CHRO have left the position vacant intentionally until the results of this study are concluded. The director would be responsible for overseeing the HR specialists and would be the direct report for this position. Although there is a CHRO and an associate superintendent as administrators over the department, there is no other designated direct report that the HR specialists can go to with questions or concerns. During interviews, it was disclosed that the volume of work and number of meetings often take the associate superintendent and CHRO away from the office, making them inaccessible to staff. In their absence, one of the HR analysts has become the default department director. Department employees seek guidance, training, and direction from the HR analyst.

Of the duties and responsibilities itemized in the HR specialist job description, most of the work the specialists focus on is recruitment and processing personnel requisitions. Interviews indicated that one HR specialist could have 30-35 positions in a month in various stages of onboarding, with another managing 10-15 positions a month. This workload distribution is based on a model to serve the sites and departments: Clovis East, Clovis West, Clovis North, and the various departments. Over the years attempts have been made to change the model to distribute the work more evenly among the specialists; however, the distribution has remained unchanged. Although the intent behind the distribution of the workload is customer service, it is not equitable. Some specialists must work overtime to complete tasks and others do not.

Sites request a new position or recruitment of a new employee for an existing position using an online personnel requisition form. The workflow is as follows:

- Originator creates a requisition.
- HR reviews information on the requisition to verify data is accurate. If data is incorrect, the requisition is sent back to the originator and resubmitted for approval. (Since the beginning of the 2021-22 fiscal year, requisitions have had to be sent back for corrections approximately 1,975 times as of the date of this report.)
- Once the requisition is verified as correct, the requisition is manually coded by HR with the range, step, hourly and annual pay rate, and any stipend amount. Coding a requisition is a manual process, including requisitions that are only modifying funding and have no substantive pay or position changes.
- Information from the requisition is manually entered into the MUNIS system.

As of the date of this report in fiscal year 2021-22, 9,280 requisitions have been processed, and it is anticipated that 10,500 requisitions will be processed by year end. Requisitions are processed twice in Human Resources: once for verification, then once for inputting into the MUNIS system. From the data

provided to FCMAT, approximately 60% of these requisitions will be for noncontracted assignments such as substitute agreements, co-curricular academic and athletic stipends, and other seasonal assignments.

Staff familiar with MUNIS should determine if electronic requisitions exist or can be created in the system to eliminate the manual entry by Human Resources. This would reduce the requisitions workflow by half and fully integrate and automate the process.

Some specialists reported that they work extra hours during the week to stay current with their workload and meet deadlines. This also includes working through lunch and not taking breaks. When each specialist was interviewed, some discussed not needing to work overtime while others were working close to 30 hours a month in overtime. When discussed with the executive team, it was stated that overtime has been offered to staff during meetings, especially since there has been so much turnover, yet only some staff are reporting their time.

Interviews revealed that there has been significant turnover in the HR department, specifically with the HR specialist position. Of the nine specialists, two have been there for five years, one for 27 years, and the other six for less than one year with varying degrees of HR experience. The HR analyst provides training to new HR specialists on the computer platforms and systems used in HR and the district, as well as other HR and district internal processes. Most of the training is provided by the HR analyst and is done while on the job. OneNote is another tool utilized for training HR staff. OneNote is updated periodically through the year as processes change. New specialists stated the amount of information in OneNote is overwhelming, and searching for an answer to a process or procedure was noted to be difficult. The task of editing and maintaining the manual is not listed in the HR analyst job description. However, one of the analysts spends considerable time ensuring the manual is up to date in OneNote.

When vacancies occur, utilizing another staff member to fill in until the position is filled is critical. To achieve this, staff need to be cross trained. Staff cross training means that more than one employee should be able to perform each job in the department. All staff members should be able to perform other desk duties in someone's absence or vacancy. Inadequate cross training is often a problem even in the largest central offices. To effectively cross train, as discussed later in this report, employees should develop and document their tasks and duties by means of a desk manual rather than a database for the whole department. Desk manuals specific to each desk would provide new specialists with useful guidance, itemizing each major task and designated responsibility, providing a step-by-step guide for others to perform their required tasks when they are absent and/or when additional support is needed to ensure timely completion of a task. Lastly, an effective way for an organization to improve efficiency and outcomes is to invest in a structured staff development program based on organizational goals and focused needs of the individual department and staff members.

## Recommendations

*The district should:*

1. Address the HR specialists' workloads by reviewing how the sites and departments are divided amongst the specialists and redistribute accordingly.
2. Review the workflow of requisitions to evaluate if it is necessary to have certain requisitions flow through HR.
3. Determine which current manual processes can be automated.

4. Work with third party vendor MUNIS to see what electronic requisition options could potentially eliminate manual input of a requisition into the system.
5. Remind staff and hold them accountable for following federal/state laws and board policy regarding overtime/compensatory time to ensure legal compliance.
6. Implement procedures to control overtime worked by employees and ensure all overtime work is properly compensated. Determine which employees have previously worked overtime without remuneration and compensate them accordingly.
7. Implement cross-training for each position within the division to ensure essential tasks and functions can be completed without interruption when an employee is absent, a position is vacant, or additional support is needed to complete tasks on time.
8. Consider filling the director of HR position.

## Human Resources Analyst

The HR analyst job description states that this position plans and conducts professional auditing and analysis work in personnel status transactions, credentialing and professional staff development, recruitment, training and process facilitating, employee communications, and state and local reporting. The position coordinates Human Resources activities with other divisions, administration, employee associations, and outside agencies. The position ensures valid teaching credentials and appropriate position assignments are compliant. The position salary range is 122, and the job description was last board approved on July 1, 2013.

Under the current structure, the district utilizes the HR analyst job description for two very different functions. The current job description outlines that the HR analysts are responsible for the following two categories:

- Credentials
- Monitoring the district's HRIS for onboarding purposes

The department is structured so that there is little to no overlap in these two functions. The two employees who perform these functions (credentials and HRIS) are not adequately cross trained. This is a concern because if the employee responsible for credentials were to leave, the other HR analyst may have difficulty fulfilling that function and may not be appropriately trained to ensure the district remains compliant.

At the time of FCMAT's fieldwork, the district was beginning to cross train an HR specialist in credentials. However, there is no official plan in place to ensure staff are appropriately and adequately cross trained. Nor is there a plan to cross train the two HR analysts in each other's roles. Staff in the HR analyst roles are responsible for highly technical procedures, and it would benefit the district to ensure that relevant staff are appropriately cross trained. They also oversee the work of other staff members.

The district should consider adding an HR analyst position for other traditional HR duties such as: employee and labor relations issues, discipline assistance to management and supervisory staff, and support for investigations, leaves, etc. The HR analyst positions do not currently handle these areas. This additional analyst position could also support the HR specialist positions when issues require greater expertise.

The district also should add an HR manager position. This position would oversee all HR analysts and HR specialists. This could be the position staff go to with concerns or questions. Clovis' current HR structure limits the district's ability to efficiently and effectively complete the tasks needed to provide customer service at a high level.

Staff has reported struggling to keep up with basic tasks due to the volume of work that is required. Both HR analysts state that they do tasks typically performed by lower classifications to keep up with basic organizational demands and assist the staff they supervise. This also impedes the district's ability to be proactive with issues as they arise. At the time of FCMAT's fieldwork, the analysts were training new staff and trying to ensure tasks were done in a timely manner.

## Recommendations

*The district should:*

1. Develop an official cross training schedule/manual to ensure the analyst positions will be able to assist if there is an unexpected vacancy or leave.
2. Add a manager position that could offer support to the analyst and specialist classifications.
3. Add an analyst position that could offer support to traditional HR functions. This should include employee/labor relations, leaves, investigations, discipline, etc.
4. With the addition of the manager and analyst positions, reevaluate the staff workflow to ensure timely responses to internal and external customers.

## Department Office Supervisor

The department office supervisor's job description states that they perform responsible and complex secretarial and clerical duties for a principal of a high school or the equivalent in volume and complexity; and assist the principal by performing routine administrative tasks and coordinating the workflow and clerical support activities of the school office.

The job description also states that the position supervises, evaluates and trains subordinate office staff; and designs, installs and monitors work methods, systems and work standards that are effective, efficient and consistent with the policies, guidelines and directives established by the school principal or district regulations. Additional tasks stated in the job description include coordinating office activities, secretarial duties, assisting in the preparation of the school budget, processing certificated and classified payroll, arranging meetings and providing work direction and guidance to clerical assistants and volunteers as assigned.

This position was originally the administrative assistant to the CHRO. The CHRO and associate superintendent of HR saw a need to ease the workload of the HR specialists, and thus removed the task of leaves of absence (LOAs) from most of the HR specialists and then reassigned it to two employees. One employee was an HR specialist with a lighter recruitment and onboarding load who was responsible for processing certificated LOAs. The other is the administrative assistant to the CHRO, who processed classified LOAs. The administrative assistant was being paid out of class to process classified LOAs. Although the task falls under the job description of a HR specialist, rather than reclassifying the

administrative assistant to a HR specialist, administration reclassified the position to department office supervisor. This was because the administrative assistant wanted to continue to support and be assigned to the CHRO. The department office supervisor position was closest in salary range to the HR specialist.

During interviews, employees called attention to the tension this reclassification created. This negatively affects staff morale and department operations. The organizational structure of the department is inconsistent with this reclassification. During the interviews, it was noted that the administrative assistant desires to help the team. However, with the tension that the reclassification created, staff are reluctant to share workload.

A major concern is that the HR department, which ultimately is responsible for ensuring job reclassification requests are correct and appropriate, has created and allowed a misclassification in the department. As the oversight department in this area, HR needs to ensure that all district job classifications are compliant and employees are paid appropriately for the work that is being done.

## **Recommendations**

*The district should:*

1. Reclassify the department office supervisor position to an administrative assistant and/or an executive assistant to support the CHRO and to be consistent with the department's organizational chart.
2. Redistribute leaves of absence among the HR specialists.
3. Develop a policy or procedure to prevent improper reclassifications.

# Human Resources Department Staffing and Restructure

Although comparative information is useful, it should not be considered the only measure of appropriate staffing levels. Every school district is complex and has various demographics and resources. Careful evaluation is recommended because generalizations can be misleading if unique circumstances are not considered. For this staffing comparison, FCMAT considered district type, student enrollment, unduplicated pupil percentage (UPP) and location when choosing the comparison districts. Data for the comparison was taken from the Ed-Data website, and department staffing information was obtained directly from the comparison districts or from the specific district's website. When utilizing data from the website, FCMAT assumed the positions were full time or a 1.0 FTE.

Data for a comparison of HR department staffing levels was obtained from the following districts: Irvine USD, Sweetwater HSD, West Contra Costa USD, Riverside USD, Stockton USD, Sacramento City USD, Lodi USD, Twin Rivers USD and Moreno Valley USD. Sweetwater is a high school district, whereas the other districts are traditional K-12 school districts. Average daily attendance (ADA) ranged from a low of 30,738 to a high of 45,079. The average ADA was 36,849. The UPP ranged from a low of 30.25% to a high of 84.62%, with the average at 68.56%. Clovis was included in the overall calculation of the averages. The data below indicates that the nine comparison districts have an average of 21.5 FTE positions in their HR departments, with an average of 36,849 ADA. Clovis USD's HR Department has 19 FTE positions, with a reported ADA of 42,790. This district is slightly declining in enrollment but is expected to open a new education center that includes elementary, middle and high schools. It is FCMAT's opinion that Clovis is significantly understaffed by 4.0 FTE. Once positions are added and staff are trained, the district could achieve greater efficiency and further reduce overtime costs, decrease staff training times, and reduce staff attrition.

District*	County	2020-21 Enrollment***	2020-21 UPP	HR FTE
<i>Clovis USD</i>	<i>Fresno</i>	42,790	56.00%	19.0
Irvine USD**	Orange	35,660	30.25%	17.0
Sweetwater High School District**	San Diego	38,602	61.79%	16.0
West Contra Costa USD**	Contra Costa	31,027	71.30%	24.0
Riverside USD**	Riverside	40,083	71.92%	24.0
Stockton USD***	San Joaquin	40,627	82.54%	26.0
Sacramento City Unified**	Sacramento	45,079	71.98%	29.0
Lodi USD**	San Joaquin	30,738	72.55%	19.0
Twin Rivers USD**	Sacramento	32,284	84.62%	19.0
Moreno Valley USD**	Riverside	31,597	82.63%	21.0
<b>Average</b>		<b>36,849</b>	<b>68.56%</b>	<b>21.4</b>

\*Information was obtained either directly from the district or from the district's website

\*\*Risk and/or benefits are a separate department

\*\*\*Census day enrollment (Ed-Data)

# Recommended Staffing

The chart below shows FCMAT’s recommended staffing, including the additional FTEs.

Human Resources & Employee Relations: Position Title	Full Time Equivalent (FTE)
Associate Superintendent, Human Resources & Employee Relations	1.0
Chief Human Resources Officer	1.0
Human Resources Director	1.0
Executive Assistant	1.0
Administrative Assistant (formerly the Department Office Supervisor)	1.0
Human Resources Manager*	1.0
Human Resources Analyst, Credentials, HRIS & Employer/Labor Relations**	3.0
Human Resources Specialist***	11.0
Human Resources Recruiter****	1.0
Human Resources Assistant I	1.0
Human Resources Assistant II	1.0
<b>Total</b>	<b>23.0</b>
*1 additional FTE	
**1 additional FTE	
***2 additional FTE	
****1 additional FTE	

## Recommended Restructure

As mentioned above in the Human Resources Specialist section, staff in these positions are assigned to various district areas: Clovis West, Clovis East, Clovis North, District Office, Operations, etc. Approximately 400 to 800 contracted employees are assigned to each area. Another 100 to 300 substitute or seasonal employees may be assigned to each area.

The HR specialists process well over 10,000 employment requisitions each fiscal year. Each employment requisition requires manual entry into the MUNIS financial system. An additional 2.0 FTE HR specialists would assist with the current workload and should decrease overtime and compensatory time. This would also ensure staff could take the appropriate breaks and lunches, as required by law.

The current part-time human resources recruiter position should increase to 1.0 FTE and filled with a permanent employee. Recruiting tasks are currently fulfilled by a retiree, on a part time basis. Due to Clovis’ size, the needs of this position require it to be full time allocated position. Lastly, FCMAT recommends the addition of the human resources manager position.

With the additional FTE, Clovis could allocate and train staff in other vital areas of human resources. Currently, certificated and classified leaves of absence are split between an HR specialist and the department office supervisor positions. These positions have no backups. If one or both employees were to go out on a leave themselves, no plan exists to ensure leaves continue to be processed and tracked appropriately.

Typically, HR specialists and analysts handle additional duties outside of recruitment and employee processing. They may handle lower-level labor relations issues or provide basic discipline assistance to management and supervisory staff. They may conduct initial investigations, process basic leaves, assist in credential requirements, etc.

An updated organizational chart should reflect the additional positions and indicate the key areas of responsibility and authority.

## Recommendations

*The district should:*

1. Add 2.0 FTE human resources specialist positions.
2. Increase the part-time recruiter position to a 1.0 FTE human resources recruiter for substitutes, and fill it with an individual who is not a retiree in the CalPERS system.
3. Add a 1.0 FTE human resources analyst position.
4. Add a 1.0 FTE human resources manager position.
5. Develop and immediately implement a cross training schedule for the newly allocated positions.
6. Allocate traditional lower-level human resources duties to managers, analysts, and specialists as appropriate.
7. Develop and implement an annual training schedule for all staff.
8. Update the organizational chart to show added positions and new task assignments.

# Risk & Benefits Department

The risk and benefits manager job description states that the position performs a wide variety of specialized and responsible tasks including the development and maintenance of a comprehensive benefits plan, risk management plan and safety programs including health and welfare and workers' compensation to minimize risk, reduce costs, and improve services to employees. The risk manager ensures consistent communications, notifications, processes, procedures, and guidelines pertaining to the safety of the staff, students, and visitors. The incumbent provides direction and develops systems and practices to disseminate information directly to the staff via email, web or other means of communication while adhering to all confidentiality requirements. The risk and benefits position salary range is 126, and the job description was last board approved on June 9, 2021. Shortly after the district approved the job description, the position was filled.

As mentioned in the job description, the risk and benefits manager is responsible for conducting Title IX investigations, possibly because the human resources director position is vacant. This appears to be a misalignment of functions and responsibilities. Title IX investigations should reside with the director of human resources and/or CHRO. The Risk and Benefits department is fairly new and needs to properly establish itself within the organization.

Although not new to Clovis USD, most of the risk and benefits staff are relatively new to their positions. Staff reported a lack of training availability and opportunities and reported being understaffed. Developing and immediately implementing a training schedule for new and existing staff should be a priority. Because most of the employees in the Risk and Benefits department are relatively new, the district can establish best practices and procedures for the staff. Training would allow them to understand their roles and to provide better customer service in their interactions. In addition, the department has highly technical responsibilities that would make a minor mistake costly for the district.

All staff members can benefit from formal training to ensure they completely understand the expectations, responsibilities, and duties of their respective positions. Appropriate training will also provide staff members with the resources to develop the skills and knowledge needed to succeed in their positions and to prepare for potential advancement.

## Recommendations

*The district should:*

1. Remove the function of Title IX investigations from the risk and benefits manager job description and place it with the director of HR and/or CHRO job descriptions.
2. Identify risk and benefits training needs.
3. Create a professional development schedule for all risk and benefits staff, including management.
4. Ensure staff receive training in all essential job responsibilities to provide optimal support.
5. Design and budget for appropriate professional development.

## Risk & Benefits Department Staffing and Restructure

As stated previously, although comparative information is useful, it should not be considered the only measure of appropriate staffing levels. School districts handle risk and benefits functions differently. FCMAT found that sometimes risk and benefits are the same department; other times, they are two separate departments. Typically, these functions are found in payroll, business, or human resources. FCMAT considered district type, student enrollment, UPP and location in choosing the comparison districts. Data for the comparison was taken from the Ed-Data website, and department staffing information was obtained directly from the comparison districts or from the specific district's website. When utilizing data from the website, FCMAT assumed the positions were full time or a 1.0 FTE.

Data for a comparison of risk and benefits staffing levels was obtained from the same districts as used for the HR department staffing comparison. FCMAT was unable to determine which districts were self-insured, a part of a group plan, or joint powers agreement (JPA); this applies to both risk and benefits departments. Clovis is included in the overall calculation of the averages. The data below indicates that the nine comparison districts have an average of 4.9 FTE positions in their risk and benefits departments, with an average of 36,849 ADA. Clovis USD's Risk and Benefits department has 4.0 FTE positions, with a reported ADA of 42,790. It is FCMAT's opinion that it is understaffed by 3.0 FTE. Once positions are added and staff are trained, the district could achieve greater efficiency and further reduce overtime costs, decrease staff training times, and reduce staff attrition.

District*	County	2020-21 Enrollment***	2020-21 UPP	RM&B FTE
Clovis USD	Fresno	42,790	56.00%	4.0
Irvine Unified**	Orange	35,660	30.25%	3.0
Sweetwater High School District**	San Diego	38,602	61.79%	7.0
West Contra Costa USD**	Contra Costa	31,027	71.30%	2.0
Riverside USD**	Riverside	40,083	71.92%	6.0
Stockton USD***	San Joaquin	40,627	82.54%	8.0
Sacramento City Unified**	Sacramento	45,079	71.98%	UN
Lodi USD**	San Joaquin	30,738	72.55%	UN
Twin Rivers USD**	Sacramento	32,284	84.62%	UN
Moreno Valley USD**	Riverside	31,597	82.63%	5.0
Average		36,849	68.56%	4.9

\*Information was obtained either directly from the district or from the district's website

\*\*Risk and/or benefits are a separate department

\*\*\*Census day enrollment (Ed-Data)

UN: unable to determine

Some districts may be self-insured for their health benefits, while some other districts may choose to be a part of a larger plan such as CalPERS Health or Self-Insured Schools of California (SISC). As with benefits, some districts' workers' compensation programs may be self-insured or be a part of a larger JPA, such as Alliance of Schools for Cooperative Insurance Programs (ASCIP).

Being a part of a larger plan for both benefits and risk management can decrease the amount of work required of staff in the risk and benefits department. The burden of negotiating and contracting with vendors shifts to the provider. Clovis USD is a part of ASCIP for its workers' compensation program. However, for health benefits the district is self-insured, and the department negotiates with health vendors yearly regarding rate and benefit changes. This information is then shared with various dis-

strict committees. Once information is shared with the various committees, the division is then provided direction as to what decision to make.

Clovis should consider increasing the staffing assigned to the Risk and Benefits department. Aside from the manager position, the current department staffing has 4.0 FTE allocated, with the risk and benefits manager position handling some duties of the vacant director of human resources position. In addition, the department lacks a return-to-work coordinator for its workers' compensation program. Clovis USD should create job descriptions and hire staff who will be responsible for the district's workers' compensation program. The department is structured so that staff dedicated to employee benefits are available, but no staff are assigned to workers' compensation to assist employees who were injured on the job. Once staffing is added, it would be beneficial for Clovis USD to develop processes and procedures for workers' compensation. These newly developed processes and procedures could have an immediate positive effect on the district's budget; specifically, the costs related to employees out on an industrial leave of absence could be reduced.

## Recommendations

*The district should:*

1. Develop and approve a job description for a return-to-work coordinator for workers' compensation.
2. Add a 1.0 FTE return to work coordinator position.
3. Develop and approve a job description for a workers' compensation technician.
4. Add a 1.0 FTE workers' compensation technician.
5. Develop and approve a job description for an assistant for workers' compensation.
6. Add a 1.0 FTE workers compensation assistant.
7. Ensure all newly added positions and staff are appropriately cross trained.
8. Review options to join a larger health insurance pool to decrease staff workload.

## Recommended Staffing

The chart below shows FCMAT's recommended staffing, including the additional FTEs.

Risk and Employee Benefits: Position Title	Full Time Equivalent (FTE)
Risk & Benefits Manager	1.0
Benefits Analyst	1.0
Return-to-Work Coordinator*	1.0
Benefits Technician	1.0
Workers' Compensation Technician*	1.0
Benefits Assistant	1.0
Workers' Compensation Assistant*	1.0
Total	7.0
*1 additional FTE	

## Customer Service

The district places a high value on customer service, and this ethic was evident during staff interviews. All staff interviewed described providing customer support to stakeholders regardless of whether the area in question was their primary responsibility, and all considered it their duty to be responsive at the time needs are expressed. While this is an admirable quality, it can disrupt the workflow and may hinder the timely completion of tasks.

A potential solution may be to require incoming questions to be sent via email, and establish a standard response time, such as within 24 hours. Each employee would then set aside a specific time of day to respond, such as the first hour of the day. This would allow staff to manage workflow without disruptions while still being responsive to stakeholders.

An additional solution is to create a Human Resources department handbook and guide. This would be an excellent resource to help staff outside of Human Resources to find the answer they need regarding their HR inquiry. This guide would provide information such as step-by-step instructions on how to create or modify personnel transactions, calendar for evaluations and forms to use, among other topics.

## Recommendations

*The district should:*

1. Establish a process that requires sites and departments to submit questions to specialists, analysts and technicians through email only, and set a specific time of day for staff to review questions and respond.
2. Create a Human Resources handbook/guide for all site and department staff to access on the HR webpage.
3. Direct and encourage site and department staff to use this online handbook to answer their questions before requesting assistance from analysts and specialists.
4. Review and update the Human Resources handbook/guide at least annually.

# Automation of Manual Tasks

Automating processes can be very difficult to do; however, when done correctly it can increase efficiency, improve accuracy, and streamline processes. The automation of routine, manual processes, no matter how small or how few staff are affected, increases productivity, freeing time for staff to perform other duties. Automated processes also make transitions easier when duties are redistributed among staff.

During FCMAT's interviews, various staff described routinely performing manual tasks that could be automated, including:

- Receiving salary and benefits data from one system and then manually entering the data into the MUNIS financial system.
- Receiving data in electronic form, then manually entering the data into a spreadsheet and then entering information into another software program.
- Manually processing personnel transactions from the MUNIS financial system and then distributing the paper reports to site and department users.

To decrease duplicative or irrelevant processes, the district could develop a flow chart of its manual processes. Any department that contributes to a particular process must be a part of this development. As the district is developing these flow charts, these questions should be considered:

- Is this process still needed/required/necessary?
- Which department is responsible for this process?
- Is there a better way to complete this process?
- Are our system(s) the cause of an ineffective or inefficient process?
- If so, can we work with our system(s) to increase efficiency/effectiveness?

This information, coupled with FCMAT's report on Clovis' business department, should help improve efficiency and effectiveness.

## Recommendations

*The district should:*

1. Collaborate with all necessary department staff to identify flow charts on current manual tasks.
2. Immediately automate routine manual processes wherever possible.
3. Work with district system vendors to determine areas where manual entry can be eliminated.

# Standard Operating Procedures – Desk Manuals

Standard operating procedures (SOPs), often referred to as desk manuals, document how to perform duties. These documents help staff with infrequently performed duties, and are a resource when duties are redistributed or when new employees are hired. SOPs ensure a task is completed with equal effectiveness regardless of who is performing the task and eliminate confusion that can lead to differing processes for the same task. Most of the staff reported procedures and SOPs for their duties could be found on the program OneNote.

Each specialist and technician is trained by an HR analyst with the rest of the training happening on the job. OneNote is intended to store SOPs and step-by-step instructions specific to the Human Resources department to be an aid in continued training. This folder is managed by the department's human resources analyst and all staff have access.

Staff reported that OneNote has become voluminous and is difficult to search for a process or procedure. New staff members who cannot find what they are looking for ask the HR analyst for assistance. This disrupts the analyst workflow and ability to get work done.

The information from OneNote could be used to create SOPs in the form of desk manuals for each position. These documents would include step-by-step procedures for job duties and workflow diagrams to ensure a better understanding of duties and their timelines. This would also ensure consistent application of internal controls and designate the responsibilities of each position. Desk manuals could help bridge the training gaps that sometimes occur after employee turnover and are especially helpful to new staff. These documents can provide training and cross training, help preserve institutional knowledge, eliminate dependency on one person, ensure staff members follow the latest and most efficient procedures, and effectively document and monitor segregation of duties. Once established, SOPs should be made available to department staff as applicable to help with transactions and best practices. With the turnover the department has experienced, documenting how tasks are performed is especially important.

## Recommendations

*The district should:*

1. Develop SOPs in the form of desk manuals that describe employees' duties and ensure that each employee includes step-by-step procedures for all assigned duties in their SOPs.
2. Consider using a third party to prepare the documents to ensure they are consistent in format and do not detract from the time staff members need to perform assigned duties.
3. Review and revise these SOPs in the form of desk manuals at least once a year.
4. Store all SOPs in one location that staff can access as needed.

# Appendix

## Study Agreement



FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

**FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM  
STUDY AGREEMENT  
January 31, 2022**

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the Clovis Unified School District, hereinafter referred to as the district, mutually agree as follows:

**1. BASIS OF AGREEMENT**

The team provides a variety of services to local education agencies (LEAs). The district has requested that the team assign professionals to study specific aspects of the district's operations. These professionals may include staff of the team, county offices of education, the California Department of Education, school districts, or private contractors. All work shall be performed in accordance with the terms and conditions of this agreement.

In keeping with the provisions of Assembly Bill 1200, the county superintendent will be notified of this agreement between the district and FCMAT and will receive a copy of the final report. The final report will also be published on the FCMAT website.

**2. SCOPE OF THE WORK**

**A. Scope and Objectives of the Study**

1. Conduct an organizational and staffing review of the Human Resources Division, including the Benefits Department and make recommendations for staffing improvements, increases or reductions, if any.
2. Review the operational processes and procedures used by the Benefits Department and make recommendations for improved efficiency, if any.

**B. Services and Products to be Provided**

1. Orientation Meeting - The team will conduct an orientation session at the district to brief district management and supervisory personnel on the team's procedures and the purpose and schedule of the study.
2. On-site Review - The team will conduct an on-site review at the district office and at school sites if necessary.
3. Exit Meeting - The team will hold an exit meeting at the conclusion of the on-site review to inform the district of significant findings and recommendations to that point.
4. Exit Letter – Approximately 10 days after the exit meeting, the team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.

- 5. Draft Report - Electronic copies of a preliminary draft report will be delivered to the district’s administration for review and comment.
- 6. Final Report - Electronic copies of the final report will be delivered to the district’s administration and to the county superintendent following completion of the review. Printed copies are available from FCMAT upon request.
- 7. Follow-Up Support – If requested by the district within six to 12 months after completion of the study, FCMAT will return to the district at no cost to assess the district’s progress in implementing the recommendations included in the report. Progress in implementing the recommendations will be documented to the district in a FCMAT management letter. FCMAT will work with the district on a mutually convenient time to return for follow-up support that is no sooner than eight months and no later than 18 months after completion of the study.

**3. PROJECT PERSONNEL**

The FCMAT study team may include:

*To be determined*

*FCMAT Staff*

*To be determined*

*FCMAT Consultant*

**4. PROJECT COSTS**

The cost for studies requested pursuant to Education Code (EC) 42127.8(d)(1) shall be as follows:

- A. \$800 per day for each staff member while on site, conducting fieldwork at other locations, preparing or presenting reports and participating in meetings. The cost of independent FCMAT consultants will be billed at their actual daily rate for all work performed.
- B. All out-of-pocket expenses, including travel, meals and lodging.
- C. The district will be invoiced at actual costs, with 50% of the estimated cost due following the completion of the on-site review and the remaining amount due upon the district’s acceptance of the final report.

**Based on the elements noted in section 2A, the total not-to-exceed cost of the study will be \$17,300.**

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

Payments for FCMAT’s services are payable to Kern County Superintendent of Schools - Administrative Agent, located on 1300 17<sup>th</sup> Street, City Centre, Bakersfield, CA 93301.

**5. RESPONSIBILITIES OF THE DISTRICT**

- A. The district will provide office and conference room space during on-site reviews.
- B. The district will provide the following if requested:

1. Policies, regulations and prior reports that address the study scope.
  2. Current or proposed organizational charts.
  3. Current and two prior years’ audit reports.
  4. Any documents requested on a supplemental list. Documents requested on the supplemental list should be provided to FCMAT only in electronic format; if only hard copies are available, they should be scanned by the district and sent to FCMAT in electronic format.
  5. Documents should be provided in advance of fieldwork; any delay in the receipt of the requested documents may affect the start date and/or completion date of the project. Upon approval of the signed study agreement, access will be provided to FCMAT’s online SharePoint document repository, where the district will upload all requested documents.
- C. The district’s administration will review a draft copy of the report resulting from the study. Any comments regarding the accuracy of the data presented in the report or the practicability of the recommendations will be reviewed with the team prior to completion of the final report.

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

**6. PROJECT SCHEDULE**

The following schedule outlines the planned completion dates for different phases of the study and will be established upon the receipt of a signed study agreement:

Orientation:	to be determined
Staff Interviews:	to be determined
Exit Meeting:	to be determined
Draft Report Submitted:	to be determined
Final Report Submitted:	to be determined
Board Presentation:	to be determined, if requested
Follow-Up Support:	if requested

**7. COMMENCEMENT, TERMINATION AND COMPLETION OF WORK**

FCMAT will begin work as soon as it has assembled an available and appropriate study team consisting of FCMAT staff and independent consultants, taking into consideration other jobs FCMAT has previously undertaken and assignments from the state. The team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the district and any other parties from which, in the team’s judgment, it must obtain information. Once the team has completed its fieldwork, it will proceed to prepare a draft report and a final report. Prior to completion of fieldwork, the district may terminate its request for service and will be responsible for all costs incurred by FCMAT to the date of termination under Section 4 (Project Costs). If the district does not provide written notice of

termination prior to completion of fieldwork, the team will complete its work and deliver its report and the district will be responsible for the full costs. The district understands and agrees that FCMAT is a state agency and all FCMAT reports are published on the FCMAT website and made available to interested parties in state government. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a report once fieldwork has been completed, and the district shall not request that it do so.

## **8. INDEPENDENT CONTRACTOR**

FCMAT is an independent contractor and is not an employee or engaged in any manner with the district. The manner in which FCMAT's services are rendered shall be within its sole control and discretion. FCMAT representatives are not authorized to speak for, represent, or obligate the district in any manner without prior express written authorization from an officer of the district.

## **9. INSURANCE**

During the term of this agreement, FCMAT shall maintain liability insurance of not less than \$1 million unless otherwise agreed upon in writing by the district, automobile liability insurance in the amount required under California state law, and workers' compensation as required under California state law. Upon the request of the district and the receipt of the signed study agreement, FCMAT shall provide certificates of insurance, with Clovis Unified School District named as additional insured, indicating applicable insurance coverages.

## **10. HOLD HARMLESS**

FCMAT shall hold the district, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting from negligent acts or omissions of FCMAT's board, officers, agents and employees undertaken under this agreement. Conversely, the district shall hold FCMAT, its board, officers, agents, and employees harmless from all suits, claims and liabilities resulting solely from negligent acts or omissions of the district's board, officers, agents and employees undertaken under this agreement.

## **11. COVID-19 PANDEMIC**

Because of the existence of COVID-19 and the resulting shelter-at-home orders, local educational agency closures and other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the District (Sections I, IV and V herein) and other provisions herein may be revised. Examples of such revisions may include, but not be limited to, the following:

- A. Orientation and exit meetings, interviews and other information-gathering activities may be conducted remotely via telephone, videoconferencing, etc. References to on-site work or fieldwork shall be interpreted appropriately given the circumstances.
- B. Activities performed remotely that are normally performed in the field shall be billed hourly as provided as if performed in the field (excluding out-of-pocket costs).

C. The district may be relieved of its duty to provide conference and other work area facilities for the team.

**12. FORCE MAJEURE**

Neither party will be liable for any failure of or delay in the performance of this study agreement due to causes beyond the reasonable control of the party, except for payment obligations by the district.

**13. CONTACT PERSON**

Name: Barry Jager, Associate Superintendent, Human Resources  
Telephone: (559) 327-9308  
E-mail: [barryjager@cusd.com](mailto:barryjager@cusd.com)





Eimear O'Brien, Ed.D., Superintendent  
Clovis Unified School District

Date



2/3/22

Michael H. Fine,  
Chief Executive Officer  
Fiscal Crisis and Management Assistance Team

Date