

# FCMAT

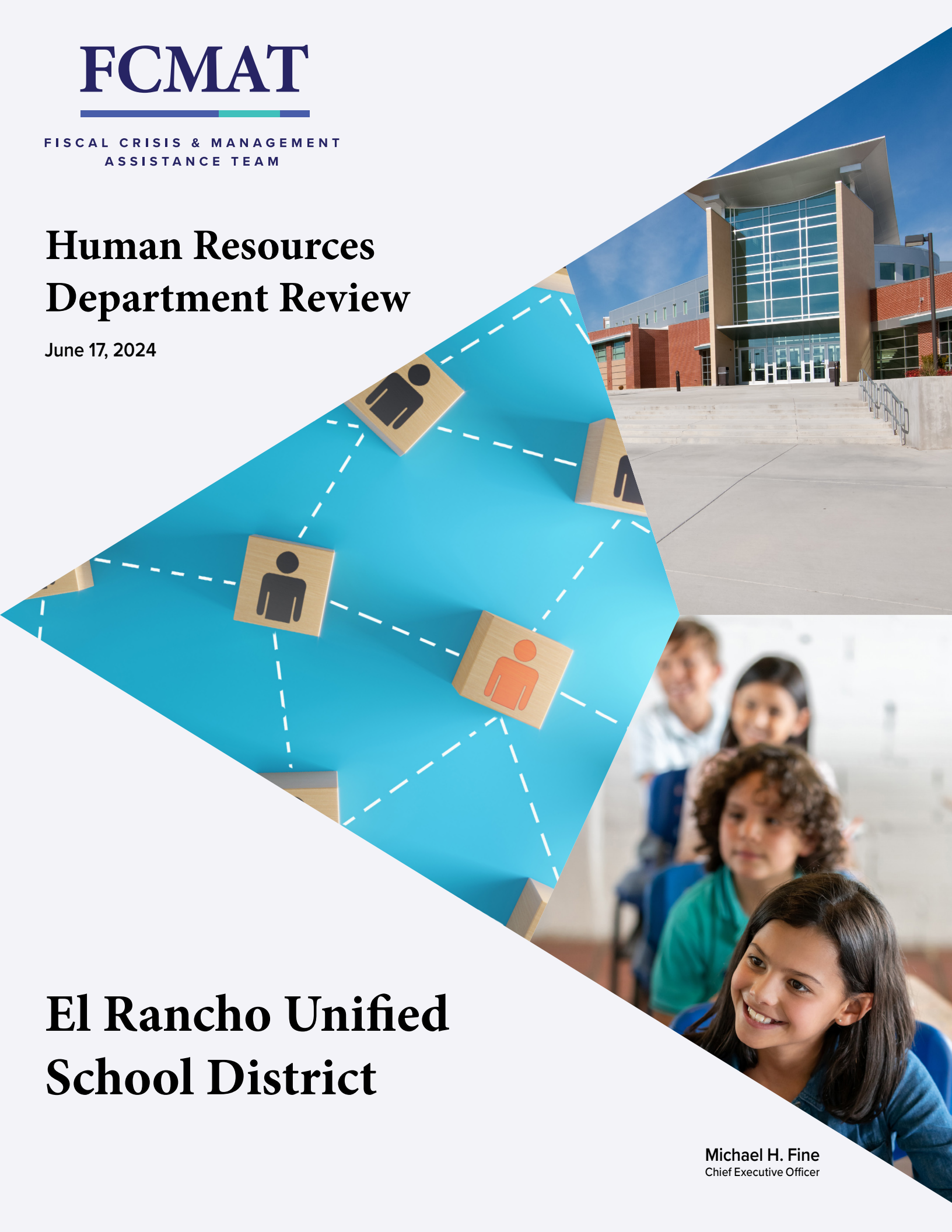
FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

## Human Resources Department Review

June 17, 2024

## El Rancho Unified School District

Michael H. Fine  
Chief Executive Officer



June 17, 2024

Marco Villegas, Superintendent, Ph.D.  
El Rancho Unified School District  
9333 Loch Lomond Drive  
Pico Rivera, CA 90660

Dear Superintendent Villegas:

In December 2023, the El Rancho Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the district's Human Resources Department. The agreement stated that FCMAT would perform the following:

1. Review operational processes and procedures in the Human Resources Department and make recommendations for improved efficiencies, if any.
2. Evaluate the workflow and distribution of functions within the department and make recommendations for improved efficiencies, if any.

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

Sincerely,



Michael H. Fine  
Chief Executive Officer

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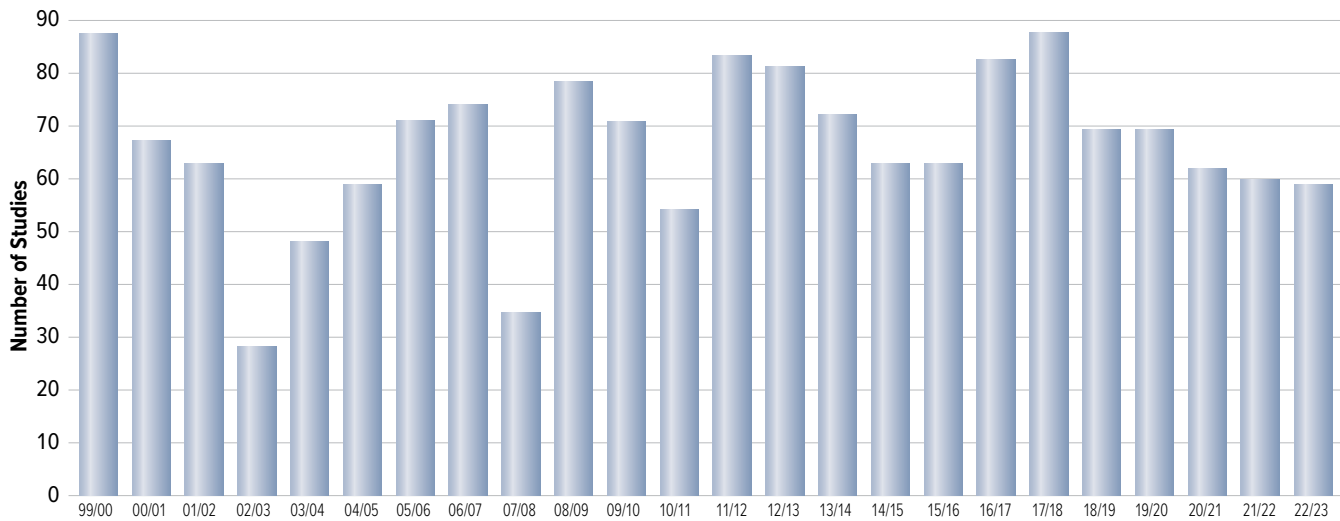
# About FCMAT

FCMAT’s primary mission is to assist California’s local TK-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 TK-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 1991 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

The El Rancho Unified School District is located in the city of Pico Rivera, California. Governed by a five-member board, it provides educational programs and services to approximately 7,628 students from transitional kindergarten through grade 12 (TK-12).

According to [Ed-Data.org](https://ed-data.org), the district has experienced a decrease in enrollment of approximately 304 students each year since the 2018-19 fiscal year. Additionally, the 2022-23 unduplicated pupil percentage — which includes students who are foster youth, eligible for free or reduced-priced meals, or identified as English learners, counting each eligible student only once even if they meet multiple criteria — was reported at 86.33%.

The district's Human Resources Department comprises approximately eight staff members. According to the district, the department serves more than 1,141 certificated and classified employees.

## Study and Report Guidelines

In December 2023, the El Rancho Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the district's Human Resources Department.

FCMAT visited the district on February 6 and 7, 2024, to conduct interviews with district and school staff, collect data and review documents. Following 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, clarity and plain language. In addition, this guide discourages the use of jargon and capitalizes relatively few terms.

## Study Team

The study team was composed of the following members:

Marcus Wirowek  
FCMAT Intervention Specialist

Jennifer Nerat  
FCMAT Intervention Specialist

Cassady Clifton  
FCMAT Technical Writer

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

# Executive Summary

El Rancho Unified School District's Human Resources Department plays a pivotal role in supporting the district through staff recruitment, professional development, and ensuring legal compliance. However, it faces significant challenges due to deficiencies in staff training and cross-training, which hinder operational efficiency and legal compliance. The HR staff's lack of regular, formal training results in a reliance on outdated practices and increases the risk of noncompliance with recent laws and regulations.

Cross-training within the Human Resources Department is essential to operational continuity and improving efficiency. However, staff with the longest tenure are stationed at a different location from new human resources staff members. This physical separation impedes effective training and collaboration, which in turn affects departmental efficiency and staff morale. Additionally, this arrangement creates confusion for employees and the public because they do not know where human resources staff are located.

Improving customer service and communication within the Human Resources Department is imperative for fostering positive relationships with both internal and external partners. To achieve this, the district needs to set clear expectations for responsiveness and establish regular feedback mechanisms. Implementing a customer service survey to gather input would help the department assess its effectiveness and identify areas for improvement, ensuring that it meets employees' needs.

Improving communication and coordination between the Human Resources and Business Services departments is critical for optimizing operations across the district. The departments have a poor relationship and do not hold regular meetings. Establishing regular interdepartmental meetings with predefined agenda items would promote communication, collaboration, problem-solving, and relationship-building. This practice would help minimize inefficiencies and improve data accuracy, leading to smoother operational processes and better overall performance.

The Human Resources Department lacks a yearly operational calendar, which leads to confusion, delays, and errors in completing tasks. Implementing a well-structured calendar that clearly assigns tasks and aligns with the initiatives of other departments can significantly enhance the department's accountability, efficiency, and compliance with legal requirements. This approach would help ensure that all activities are conducted timely and effectively, reducing the likelihood of errors and improving overall performance.

The district has severely outdated board policies that require immediate and thorough review. Board policies are the foundation of a local educational agency's (LEA's) governance, outlining the LEA's goals, procedures, and responsibilities. These policies provide a structured framework for decision-making and daily operations, ensuring that the agency operates efficiently and effectively within established guidelines. Outdated policies pose significant risks, including legal, financial, and reputational consequences. Therefore, it is essential to regularly review and revise these policies to ensure legal compliance and maintain community trust.

The district has not reviewed and revised the job descriptions for the Human Resources Department in more than 10 years. Moreover, some other district job descriptions have not been updated for more than 30 years, with some dating all the way back to 1980. Accurate job descriptions are essential for clearly defining roles, recruiting qualified candidates, and ensuring compliance with employment laws. Outdated job descriptions can result in confusion, inefficiencies, and legal risks. It is imperative that the district immediately reviews and updates all job descriptions to reflect current organizational needs and legal requirements.

Efficient leave management hinges on well-trained human resources staff, clear policies, and effective collaboration with payroll personnel. The district's staff have not received adequate training, and the board

policy on leaves for certificated, classified and management staff has not been updated since 1994. Such an outdated policy can result in legal noncompliance and operational inefficiencies. To address these issues, the district needs to implement comprehensive training programs and revise its board policy. Additionally, improving access to leave information and collaboration between human resources and payroll staff are crucial for effective leave management and ensuring organizational success.

Recruitment practices are vital for maintaining operational continuity and attracting top talent. The district has a lengthy recruitment process marked by poor communication from human resources staff to hiring managers and candidates. These issues can result in missed opportunities and increased costs. To enhance recruitment effectiveness and organizational efficiency, it is essential to establish transparent, efficient recruitment processes. This includes involving hiring managers in screenings and reference checks and providing clear guidelines and timelines. Ensuring compliance with relevant laws and regulations regarding reference checks is crucial to avoid legal liabilities.

# Findings and Recommendations

## Operational Processes and Procedures

### Overview

Human resources functions are essential to a school district’s daily operations, affecting every level of the organization. The Human Resources Department is responsible for coordinating all aspects of personnel services, including employee recruitment, selection, onboarding and training. Human resources staff help with employee evaluations and management processes and oversee employee benefits and salaries. They also develop and implement policies and procedures to ensure compliance with collective bargaining agreements and labor laws and regulations. A school district relies on its Human Resources Department to effectively manage personnel matters and develop a high-performing workforce.

Effective human resources departments are skilled in communication, conflict resolution, and employee development. They proactively provide guidance on workplace policies and practices while actively seeking feedback from employees to foster a supportive work environment. They also promote positive employee relations and a fair and respectful work environment, all of which contribute to a school district’s long-term success and fiscal solvency.

The Human Resources Department consists of eight staff. The department’s structure as of the time of fieldwork is shown below in figure 1.

#### 2023-24 El Rancho Unified School District Human Resources Department Organizational Chart

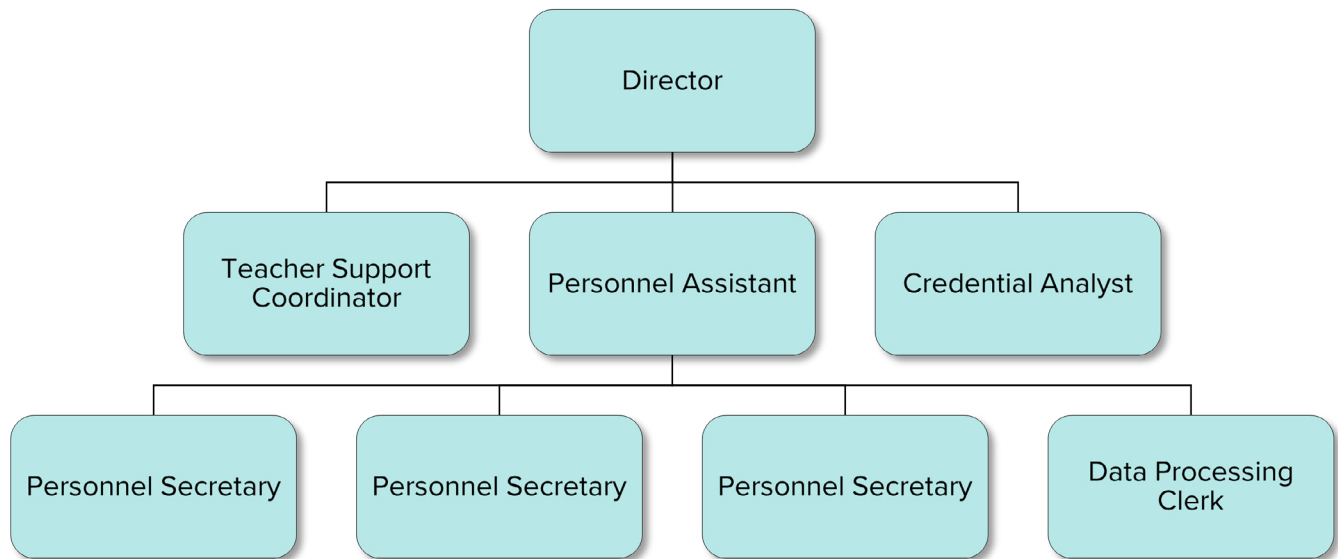


Figure 1. Organizational chart of the district’s Human Resources Department.

**Source:** Adapted from district-provided information.

At the time of fieldwork, the director of the Human Resources Department was on leave, and both the data processing clerk position and one of the personnel secretaries positions were vacant. The personnel assistant oversees and supports the personnel secretaries, both of whom were hired within the last 18 months.

# Staff Training

Local educational agencies must ensure that Human Resources Department staff receive comprehensive training in their assigned areas of responsibility, complemented by clear direction and consistent oversight from managers. Staff must have the knowledge and skills to perform human resources functions effectively and stay informed about the latest legal requirements and board policies. Proper training not only improves employee competence but is also essential for efficient and effective operations.

Providing training for new employees sets the foundation for success. Human resources staff should attend regular training sessions that cover best practices, new laws, and the latest regulations and requirements for personnel functions, including the department’s own policies and procedures. Developing and implementing a training schedule as soon as human resources staff are hired ensures that the department can continue to provide technical support to the district and helps fill knowledge gaps. This enables staff to perform their duties effectively and in alignment with district standards.

In addition to providing training during onboarding, it is best practice for the Human Resources Department to select annual trainings for staff and include them in a written plan for staff development. This ensures that staff receive the knowledge they need to better support the district and fully understand their many job requirements. Moreover, employees feel appreciated and valued when their employer invests in them by providing quality training that is tailored to their individual needs. Ongoing training can help with employee retention, boost morale, and increase the LEA’s capacity and effectiveness.

During interviews, Human Resources Department staff indicated they do not receive regular, formal training that is tailored to their specific roles. They also lack desk manuals that provide detailed instructions for completing routine tasks, and there is no comprehensive handbook outlining department policies and procedures. In addition, when staff are hired or assigned to positions within the department, they receive only minimal training from their colleagues.

Human resources staff indicated that their colleagues are not always available to provide training or help because they are either managing their own workloads or working in another location, making them less accessible (for more details, see the “Customer Service” subsection of this report). Consequently, staff have to self-train in various procedures and rely on the department’s established past practices to guide their work.

Human resources staff expressed uncertainty about whether the department’s procedures are legally compliant, particularly regarding leaves of absence (for more details, see the “Leave Management” subsection of this report). They believe they must adhere to past practices, even when these contradict updated regulations and may not be legally compliant. Human resources staff would benefit from regular ongoing training, which could help correct these issues. Additionally, developing a department handbook to document policies and procedures would also improve efficiency and ensure continuity of operations during staff absences.

Over the past four years, the district has provided human resources staff with various professional development sessions, as shown in table 1 below.

**Table 1. Overview of professional development events attended by El Rancho Unified School District Human Resources Department staff from 2020-21 to 2023-24.**

Year	Professional Development/Description
2023-2024	Frontline software orientation webinar (Recruiting and Hiring Module)
	Frontline software online training tutorials for all district employees (Absence Management Module)

Year	Professional Development/Description
2022-2023	Leaves workshop conducted by legal counsel
	Frontline software online training tutorials for all district employees (Absence Management Module)
2021-2022	Frontline software (absence management module)
	Frontline software online training tutorials for all district employees (Absence Management Module)
2020-2021	Frontline software online training tutorials for all district employees (Absence Management Module)
	Frontline software implementation training (Central Module)
	Presentation of Human Resources Department memorandums

**Source:** Reproduced from district-provided information.

Although opportunities for training on Frontline software have been provided annually, human resources staff are still unfamiliar with how to use the Frontline Absence Management Module to check both employee leave balances and their own. Staff were also uncertain whether they had system access to this information.

Human resources staff must have a working knowledge of the legal requirements for human resources administration as established in the Education Code and federal and state regulations. It is also crucial for human resources staff to thoroughly understand the district's board policies and collective bargaining agreements, which drive local practices. Human resources staff indicated they are uncertain about whether the district's board policies comply with federal and state regulations, and many are unfamiliar with the provisions outlined in the district's collective bargaining agreements.

Human resources staff attributed their lack of training to two main causes: (1) local training events usually hosted by the Los Angeles County Office of Education (LACOE) were suspended during the pandemic; and (2) the human resources administration did not support staff's attendance at the events that did occur. Staff also indicated that they were unaware of other professional development opportunities offered by organizations such as School Services of California and California School Business Officials (CASBO). They also do not subscribe to reputable email listservs or publications that provide regular updates on human resources issues and laws. This lack of training and knowledge is concerning, given the highly technical nature of human resources and the constantly evolving legal landscape. Errors in managing aspects such as employee leaves can have serious repercussions for employees and result in significant costs for the district.

In addition to addressing its own training needs, the Human Resources Department needs to provide district managers with regular interdepartmental training on important topics including employee evaluation and discipline procedures, employee leave administration, and hiring protocols. This approach would ensure that all managers execute their responsibilities correctly and in accordance with district personnel processes.

Documents provided by the district indicate that in 2023-24, the Human Resources Department has conducted training for school administrators and department managers on employee evaluations and sexual harassment prevention. Training on disciplinary procedures was also provided, but it was not clear who attended it. During interviews, managers reported a lack of guidance and training on the hiring process, including protocols for conducting reference checks and administering employee leaves of absence.

Hiring managers expressed concerns about inconsistencies in handling personnel matters. They stated that past practice is always followed, even when it conflicts with rules, regulations, board policies or industry best practices. This adherence to past practices suggests that human resources staff lack adequate train-

ing. The outdated practices and inconsistent handling of employment matters leave the district vulnerable to complaints or legal claims.

## Cross-Training

Cross-training involves training employees to perform tasks beyond their job descriptions. This practice offers numerous advantages that can improve a school district's overall performance. For instance, it ensures continuity of operations by enabling a second individual to step in and perform another employee's duties when the primary employee is unavailable. Additionally, having multiple employees trained for the same tasks provides a built-in system of checks and balances, allowing for the detection and correction of errors or irregularities.

Furthermore, cross-training promotes a deeper understanding of the roles and responsibilities within a school district, fostering collaboration and improving communication among employees. It also contributes to continuity during employee transitions because cross-trained employees can readily assume additional responsibilities as needed. This not only bolsters operational efficiency but also mitigates the impact of turnover by empowering employees to adapt to changing demands and challenges.

Cross-training also plays a vital role in reducing turnover by providing opportunities for skill development and growth, thereby increasing employee retention over the long term. Cross-training is not designed to make employees interchangeable or replace the need for specific knowledge, skills, and abilities. Rather, it enables school districts to sustain operations during crises and short-term employee absences. To implement effective cross-training, each employee needs to develop and document standard operating procedures for their major tasks and responsibilities, ideally in a desk manual.

Most of the knowledge required to manage human resources functions for certificated staff is held by one person in the district's Human Resources Department. This leads to inefficiencies and is not aligned with best practices. It is imperative that the department make cross-training in certificated functions a priority and an expectation for all staff immediately. Without such cross-training, the department risks significant disruption in essential operations, such as credential monitoring, when this employee is absent. More detailed information on how the Human Resources Department divides duties between those related to certificated employees and those related to classified employees can be found in the "[Job Descriptions](#)" subsection of this report.

## Recommendations

*The district should:*

1. Ensure the Human Resources Department develops an annual written training plan so staff can better support the district and improve operational efficiency.
2. Ensure Human Resources Department staff regularly attend training on relevant TK-12 public school issues.
3. Seek training opportunities through LACOE and other organizations.
4. Subscribe to email listservs and publications to keep updated on industry best practices and regulatory changes.
5. Create a handbook for the Human Resources Department that details policies and procedures.

6. Provide Human Resources Department staff with access to board policies and collective bargaining agreements to increase their understanding of how these documents affect department practices and procedures.
7. Provide district management staff with annual and other ongoing professional development related to personnel issues.
8. Immediately develop and implement a cross-training plan for Human Resources Department staff in functions related to certificated employees.

## Customer Service

It is essential that schools and departments be given the opportunity to offer feedback on the service provided by the Human Resources Department. This practice not only facilitates the development of best practices but can also increase efficiency and boost morale. Furthermore, it encourages collaboration among employees and promotes a deeper understanding of the various roles and their interconnectedness. Obtaining feedback could help the Human Resources Department to develop relationships with district staff, ultimately resulting in better customer service.

Conducting an annual customer service survey is a common and effective method to identify opportunities to improve customer service. Such a survey would provide the Human Resources Department and district leaders insights into the quality of customer service being delivered. Without this feedback, it is difficult for the district and human resources leadership to accurately assess and implement the necessary improvements.

Improving customer service needs to become a top priority for the district's Human Resources Department. A crucial first step is for the governing board, superintendent, and director of human resources to establish a clear expectation of excellent customer service. Adopting a standard that requires human resources employees to return telephone calls and emails promptly is essential for delivering efficient and effective service.

Interviews indicated that the Human Resources Department is often perceived as unhelpful, leading staff and management to avoid interacting with it when possible. Management also expressed feeling unsupported, particularly in disciplinary matters. They reported a lack of resources to discipline staff, and cited instances in which human resources staff informed them that employees would not be disciplined, even when it seemed appropriate and consistent with board policy.

Interviews indicated that staff are unsure about where to seek help because the Human Resources Department has moved a few times, and the moves were not communicated to district staff. Initially, the department moved because of mold issues in the previous office, a problem that has since been resolved. The district's Human Resources Department is divided between two locations, leading to confusion among both new and current employees.

Assigning human resources staff to two separate locations is not conducive to efficient district operations. More experienced staff, focusing solely on certificated staffing, are located in one office, while newer, less experienced staff who manage classified staffing are in another. This separation has made newer staff reluctant to seek assistance, leading to a noticeable disconnect and lack of communication between the two human resources sites. Interviews also indicated that the department's morale has declined because of by the physical separation of its staff.

Scheduling Human Resources Department meetings every two weeks would be beneficial, especially for a Human Resources Department that operates across two locations. Regular meetings are essential for main-

taining clear communication and efficient operations. They help ensure that all department staff are kept informed about district policies, updates, and ongoing projects. Additionally, these gatherings can help foster relationship-building and a unified departmental culture despite the separation. They also provide a valuable platform for addressing challenges, sharing information, conducting training, and ensuring that all employees receive consistent support and resources.

Centralizing the Human Resources Department into a single location would be advantageous for the district, provided there is space to accommodate this change. Regardless, ensuring that both staff and the public have a clear understanding of where to find the Human Resources Department would significantly improve interactions and lessen confusion.

## Communication

Clear, consistent and open communication is essential for the smooth operation of an LEA. Communication can take various oral or written forms. Oral communication may occur through phone conversations or in-person interactions, either one-on-one or in group settings like meetings. Written communication encompasses a variety of formats, including memos, emails, policy and procedure manuals, board policies and administrative regulations, forms, handbooks, and desk manuals, among others. Fostering an organizational culture that prioritizes open communication promotes knowledge-sharing, collaboration and transparency, all of which are vital to the long-term success of an LEA.

Communication issues were frequently highlighted in interviews with district staff. Staff stated that the Human Resources Department often fails to notify managers when employees are changing or transferring schools. For example, one manager noted that, after a transfer was initiated at the start of the year, the vacated position — a teaching role — remained unfilled for over a year. Consequently, students assigned to that class were taught by a substitute for the entire school year. Moreover, staff stated that the Human Resources Department did not start the recruitment process until a few weeks after the employee had moved to the new school. Human resources management was not informed about the reasons for or the purpose of the delay.

Staff also stated that the Human Resources Department often fails to follow through on assigned tasks and does not respond in a timely manner. Managers and staff outside the department are unclear about the roles and responsibilities of human resources staff, and the department has not communicated the systems available to help employees. Consequently, many staff members expressed feeling unsupported when addressing human resources issues.

## Human Resources Department Communication with the Business Office

Effective collaboration between the Human Resources and Business Services departments is crucial because many essential tasks and functions depend on their joint efforts. However, staff indicated a significant lack of coordination between these departments. Regular meetings that once facilitated cooperation have been discontinued. When meetings are held, staff stated that they often devolve into finger-pointing over who is responsible for various issues. This was observed during interviews with management, who blamed one another for specific problems.

The dysfunction within the departments is due to improper workflows and inadequate training, which compromise efficiency and damage the reputations of both departments in the eyes of district staff. It is crucial for management to take the lead in fostering better collaboration and communication between

these departments. Improved collaboration can improve efficiency, accuracy, timeliness, customer service, ultimately reducing problems and issues.

Management needs to schedule regular interdepartment meetings between the Human Resources and Business Services departments to ensure effective communication and coordination. These meetings should include standing agenda items such as:

- New hires.
- Effective dates of separations.
- Leaves of absence.
- Workflow.
- Process improvements.
- Position control.
- Payroll.

Staff should be able to suggest agenda items, and each meeting should be memorialized with meeting minutes. Additionally, actions taken because of these meetings should be tracked and reviewed to ensure accountability. This ongoing review will help identify areas needing further attention and contribute to the efficiency of both departments.

In addition, the Human Resources and Business Services departments lack a joint calendar for major events and responsibilities, despite their interconnected functions such as hiring, payroll and position control. Because employee salaries and benefits typically make up 85-90% of a district's budget, these departments are deeply intertwined. Therefore, it is imperative for human resources and business services staff to collaborate closely to ensure the district operates as efficiently as possible.

FCMAT's Fiscal Health Risk Analysis (FHRA) tool helps districts assess their fiscal health. The FHRA includes 20 sections, each containing questions tied to the common indicators of risk or potential insolvency. These indicators have been identified in districts that neared fiscal insolvency and required assistance from outside agencies. The district would benefit from using Section 19 of the FHRA, titled "Position Control," to monitor and implement best practices for its Human Resources and Business Services departments. Below are the questions pertaining to human resources and business services functions:

- 19.2 Does the district analyze and adjust staffing based on staffing ratios and enrollment?
- 19.3 Does the district reconcile budget, payroll and position control regularly, at least at budget adoption and interim reporting periods?
- 19.4 Does the district identify a budget source for each new position before the position is authorized by the governing board?
- 19.6 Do managers and staff responsible for the district's human resources, payroll and budget functions meet regularly to discuss issues and improve processes?

If a district cannot answer "Yes" to all the questions above, it risks failing Section 19 of the FHRA. At the time of fieldwork, the district could not answer "Yes" to these questions.

## Recommendations

*The district should:*

1. Ensure Human Resources Department staff fully understand and adhere to the district's expectations to provide efficient, timely communication and excellent customer service to both applicants and employees.
2. Establish a districtwide standard timeline for answering emails and telephone calls, specifying that if a complete response will be delayed, the initial reply must include an estimated time for the full response.
3. Implement a customer service survey to identify, address and support areas needing improvement.
4. Ensure that the Human Resources Department conducts meetings every two weeks and memorializes each with an agenda and minutes.
5. Ensure that the Business Services and Human Resources departments meet at least monthly, with increased frequency during financial reporting periods, and memorialize each meeting with an agenda and minutes.

## Information Systems

For a local educational agency (LEA) to operate efficiently and effectively, it requires access to reliable and integrated information systems that deliver accurate and consistent data across its departments and functions. These systems are essential for collecting, analyzing, maintaining, and reporting data for both local use and state and federal reporting. In the context of human resources, the systems need to effectively manage payroll and personnel details, including credentials, seniority, evaluations, leave balances, and demographic information. Once the data is collected and entered into the LEA's database, it should be easily accessible and shared with other information systems, avoiding the need for redundant data entry. Integrated systems facilitate timely information sharing and minimize the risk of human error.

The district's Human Resources Department uses a variety of information systems to support its operations. Human resources staff use the Human Resource System (HRS) to input employee profiles, which include pay information that the Business Services Department uses for payroll processing. PC Products complements the HRS employee database by facilitating data queries and generating reports. Human resources staff also use various Frontline software modules to manage data related to absence management, personnel records, and recruitment and hiring functions.

The Frontline Absence Management Module, designed to track employee leaves, is not integrated with HRS and has not been fully enabled due to ongoing staff transitions and the extensive time and effort required for implementation. At the time of fieldwork, the module's functions were limited, allowing employees to only enter their absences and view the total leave taken. As a result, employees must rely on their paychecks to view their current leave balances. If the module were fully operational, it would enable both employees and human resources staff to access up-to-date leave balances. The module's limited functionality creates inefficiencies, potential errors, and confusion.

## Internal Controls

The term "internal control" refers to the procedures and protocols used by an LEA to protect its assets and ensure efficient operations. Internal control is the primary mechanism for preventing and/or deterring illegal acts or fraud. Proper internal control provides reasonable assurance that operations are effective and efficient, that the financial information produced is reliable, and that the LEA complies with all applicable laws and regulations.

A strong internal control framework relies on effective control activities, which are directly influenced by policies and procedures to protect assets by preventing and detecting misuse. Segregation of duties is a key control activity that involves distributing the responsibilities for processing transactions involving LEA assets among several individuals. This includes (1) authorizing transactions, (2) recording related transactions, and (3) executing the transactions. A practical example of this is in processing employee payments, where segregation of duties ensures that different individuals manage the authorization, recording, and execution of payroll transactions. This practice creates multiple levels of authorization in the payroll process, which helps safeguard the LEA's assets.

Interviews suggested that human resources staff can override and change employee payroll information within HRS. This indicates a lack of adequate segregation of duties and internal controls, which jeopardizes data integrity and increases the risk of recording inaccurate information. This, in turn, could compromise the accuracy of employee compensation. Staff indicated that the district conducts semiannual reviews of authorization and access levels for its personnel and payroll information systems, this oversight process needs to be more stringent and conducted more frequently to ensure sound internal controls.

The district would benefit from using Section 14 of the FHRA, titled "Information Systems and Data Management," and Section 15, titled "Internal Controls and Fraud Prevention," to monitor and implement best practices for internal controls and system access. Below are the questions pertaining to information systems found in these sections.

- 14.1 Does the district use an integrated financial and human resources system?
- 14.4 Is the district using the same financial system as its county office of education?
- 14.5 If the district is using a separate financial system from its county office of education, is there an automated interface that allows data to be sent and received by both the district and county financial systems?
- 14.6 If the district is using a separate financial system from its county office of education, has the district provided the county office with direct access so the county office can provide oversight, review and assistance?
- 15.2 Are the district's financial system's access and authorization controls reviewed and updated upon employment actions (e.g., resignations, terminations, promotions or demotions) and at least annually?
- 15.3 Does the district ensure that duties in the following areas are segregated, and that they are supervised and monitored?: ... Payroll ... Human resources (i.e., duties relative to position control and payroll processes)

If a district cannot answer "Yes" to all the questions above, it risks failing Sections 14 and 15 of the FHRA. At the time of fieldwork, the district could not answer "Yes" to some of these questions.

## Recommendations

*The district should:*

1. Train Human Resources Department staff to run report queries in HRS and PC Products so data can be used to support human resources functions.
2. Confirm that Frontline Absence Management is fully functional if it will be used to track absences and leave balances.

3. Immediately review and, if necessary, update the Human Resources Department staff's access to HRS payroll functions to ensure segregation of duties.

# Workflow and Distribution of Functions

## Yearly Operational Calendar

The purpose of a yearly operational calendar is to organize and plan the execution of the staff's tasks and responsibilities within a department. These calendars should assign specific tasks to each position, providing clear guidance to employees and improving accountability and efficiency. This can also help to ensure compliance with legal and regulatory requirements.

The district's Human Resources Department lacks a yearly operational calendar, which is essential for notifying staff of important deadlines, recruitment events, and annually required governing board agenda items specific to human resources. Some staff also expressed uncertainty about who in the department is responsible for certain tasks; this contributes to delays, errors, and overlooked responsibilities with potentially serious consequences for the district. To address these issues, the Human Resources Department needs to develop and implement a calendar that includes clearly assigned tasks. This will ensure that all employees understand their responsibilities and complete tasks efficiently and timely. Additionally, these assignments should be aligned with other departments' dates and initiatives because of the interconnected nature of the district's operations. A sample calendar is provided in [Appendix B](#) of this report.

Meetings with other departments, such as business services, should also be included in the development of the Human Resources Department's yearly operational calendar. These meetings facilitate departments' relationship-building and collaboration on important projects and initiatives, the communication of essential information, and a better understanding of the organization. This can also help inform human resources-related policies and initiatives and contribute to the department's long-term success and efficiency.

## Recommendations

*The district should:*

1. Develop and implement a yearly operational calendar for the Human Resources Department.
2. Ensure that Human Resources Department staff are adequately trained in their assigned tasks and/or functions.
3. Share the Human Resources Department's yearly operational calendar with other departments to foster communication, coordination and collaboration.

## Board Policy

In most LEAs, the governing board is responsible for creating and adopting written policies that establish the guidelines and limits under which staff may act. Education Code (EC) 35100-35401 defines the powers and duties of a governing board to adopt and implement these policies. Board policies provide a clear and consistent framework that helps LEAs ensure compliance with legal requirements. These policies are shaped by various laws, including the Education Code, Government Code, Public Contract Code, Code of Federal Regulations, as well as by case law and individual LEA practices.

Furthermore, board policies are formal statements that outline the LEA's goals, expectations, and procedures in various areas such as student discipline, personnel management, and fiscal operations. These policies provide direction and define responsibilities, thereby fostering stability and continuity. They also

play a crucial role in promoting transparency and accountability by clearly communicating the governing board's expectations and the LEA's guidelines to administrators, teachers, staff, parents, students and the local community. This helps everyone understand the decision-making process and encourages participation in it.

To be effective, board policies must include all requirements mandated by laws or regulations and should use language that the LEA can fully implement. These policies should not contain any provisions beyond the LEA's legal authority. Given the rapidly evolving legal landscape, it is imperative for LEAs to regularly review and revise their board policies to ensure compliance with all legal requirements. This practice not only builds community confidence but also helps protect the organization from legal challenges and ensures that the governing board, superintendent, and staff are working diligently to maintain legal compliance and mitigate risks. LEAs that fail to keep their board policies up to date are at risk for:

- **Legal consequences:** Outdated policies can expose an LEA to violations of federal and state laws and regulations. For example, noncompliance with student safety laws could lead to the LEA being found liable if a student is harmed. Similarly, failing to follow employment laws might result in legal action against the LEA.
- **Financial consequences:** Outdated policies can put an LEA at financial risk. For example, noncompliance with federal or state laws might lead to lost funding or fines. Additionally, lawsuits over policy violations could incur legal fees and other related costs.
- **Reputational consequences:** Outdated policies can damage an LEA's reputation among staff, parents, students and the local community. For example, failure to follow laws or policies related to student safety can erode community trust and attract negative publicity.

Conducting an annual review of board policies is essential for maintaining compliance with the law and ensuring effective, efficient operations. Regularly adopting and revising board policies to include legal changes, best practices, and industry standards helps LEAs mitigate risks, promote efficient operations, and provide a safe, equitable learning environment for all students. FCMAT reviewed the district's personnel-related board policies and found that most have not been reviewed or revised in more than three decades. Of the approximately 179 board policies, 139 were last updated in 1994. Table 2 lists these policies along with the dates of their last revision.

**Table 2. List of personnel-related board policies and their revision dates at Rancho Unified School District.**

Series 4000: PERSONNEL	Board Policy #	Last Revised
<b>All Personnel</b>		
Concepts and Roles	4000	2/22/1994
Drug and Alcohol-Free Workplace	4020	2/22/1994
Nondiscrimination in Employment	4030	8/18/2020
Complaints Concerning Discrimination in Employment	4031	8/27/2009
Reasonable Accommodation	4032	9/13/2007
Employee Use of Technology	4040	2/4/2014
<b>Certificated Personnel</b>		
Recruitment and Selection	4111	4/18/2013
Affirmative Action	4111.1	2/22/1994
Legal Status Requirement	4111.2	2/22/1994
Certification	4112.2	2/22/1994
Staff for Limited-English Proficiency Programs	4112.22	2/22/1994

<b>Series 4000: PERSONNEL</b>	<b>Board Policy #</b>	<b>Last Revised</b>
<b>Certificated Personnel</b>		
Special Education Staff	4112.23	2/14/2008
Teacher Qualifications Under the No Child Left Behind Act	4112.24	9/13/2007
Oath or Affirmation	4112.3	2/22/1994
Health Examinations	4112.4	2/22/1994
Criminal Record Check	4112.5	9/13/2007
Personnel Records	4112.6	2/22/1994
Employment References	4112.61	2/22/1994
Employment of Relatives	4112.8	2/22/1994
Signed Statements	4112.9	2/22/1994
Assignment	4113	2/14/2008
Temporary Modified and Alternative Duties Return to Work Program	4113.4	4/11/2000
Transfers	4114	2/22/1994
Evaluation/Supervision	4115	2/14/2008
Probationary/Permanent Status	4116	9/23/1997
Resignation	4117.2	2/22/1994
Personnel Reduction	4117.3	2/22/1994
Dismissal	4117.4	10/13/2011
Decision Not to Rehire	4117.6	2/22/1994
Suspension/Disciplinary Action	4118	2/22/1994
Rights, Responsibilities and Duties	4119	2/22/1994
Civil and Legal Rights	4119.1	9/13/2007
Sexual Harassment	4119.11	8/18/2020
Duties of Personnel	4119.13	2/22/1994
Codes of Ethics	4119.21	2/22/1994
Unauthorized Release of Confidential/Privileged Information	4119.23	2/22/1994
Political Activities of Employees	4119.25	10/13/2011
Employees with Infectious Disease [sic]	4119.41	2/22/1994
Exposure Control Plan for Bloodborne Pathogens	4119.42	2/22/1994
Universal Precautions	4119.43	2/22/1994
Temporary and Part-Time Personnel	4120	2/22/1994
Substitute Teachers	4121	2/22/1994
Temporary Athletic Team Coaches	4127	2/22/1994
Staff Development	4131	2/22/1994
Inservice Education/Visitations; Conferences	4131.3	2/22/1994
Professional Growth	4131.5	2/22/1994
Publication or Creation of Materials (includes copyrights and patents)	4132	2/22/1994
Travel Expenses	4133	2/22/1994
Soliciting and Selling	4135	2/22/1994
Nonschool Employment	4136	2/22/1994
Tutoring	4137	2/22/1994
Mentor Teachers	4138	2/22/1994

<b>Series 4000: PERSONNEL</b>	<b>Board Policy #</b>	<b>Last Revised</b>
<b>Certificated Personnel</b>		
Peer Assistance and Review Program	4139	4/11/2000
Agreement	4141	2/22/1994
Concerted Action/Work Stoppage	4141.6	2/22/1994
Negotiations/Consultation	4143	2/22/1994
Public Notice — Personnel Negotiations	4143.1	2/22/1994
Complaints	4144	2/22/1994
Salary Guides	4151	2/22/1994
Salary Checks and Deductions	4152	2/22/1994
Health and Welfare Benefits	4154	2/22/1994
Awards and Recognition	4156.2	2/22/1994
Employee Property Reimbursement	4156.3	2/22/1994
Employee Safety	4157	2/22/1994
Work-Related Injuries	4157.1	4/11/2000
Employee Security	4158	2/22/1994
Leaves	4161	2/22/1994
<b>Classified Personnel</b>		
Classified Personnel	4200	2/22/1994
Recruitment and Selection	4211	4/18/2013
Affirmative Action	4211.1	2/22/1994
Legal Status Requirement	4211.2	2/22/1994
Qualifications Appraisal/Examination	4211.21	1/17/2008
Eligibility Lists	4211.3	2/22/1994
Selection Interviews	4211.4	2/22/1994
Refusals of Employment and Withholding of Names	4211.5	2/22/1994
Appointment and Conditions of Employment	4212	2/22/1994
Staff for Limited-English Proficiency Programs	4212.2	2/22/1994
Oath or Affirmation	4212.3	2/22/1994
Health Examinations	4212.4	2/22/1994
Security/Credit Check*	4212.5	9/13/2007
Personnel Records	4212.6	2/22/1994
Employment References	4212.61	2/22/1994
Employment of Relatives	4212.8	2/22/1994
Signed Statements	4212.9	2/22/1994
Assignment/Classification	4213	2/22/1994
Promotion/Demotion/Reclassification	4213.2	1/17/2008
Temporary Modified and Alternative Duties Return to Work Program	4213.4	4/11/2000
Transfer/Reassignment	4214	2/22/1994
Evaluation/Supervision	4215	1/17/2008
Probationary/Permanent Status	4216	2/22/1994
Retirement	4217.1	2/22/1994
Resignation	4217.2	2/22/1994

<b>Series 4000: PERSONNEL</b>	<b>Board Policy #</b>	<b>Last Revised</b>
<b>Classified Personnel</b>		
Layoff/Rehire	4217.3	2/22/1994
Dismissal/Suspension/Disciplinary Action	4218	10/13/2011
Civil and Legal Rights	4219.1	9/13/2007
Sexual Harassment	4219.11	8/18/2020
Duties of Personnel	4219.13	2/22/1994
Codes of Ethics (see 4119.21)	4219.21	2/22/1994
Unauthorized Release of Confidential/Privileged Information	4219.23	2/22/1994
Political Activities of Employees	4219.25	10/13/2011
Employees with Infectious Disease [sic]	4219.41	2/22/1994
Exposure Control Plan for Bloodborne Pathogens	4219.42	2/22/1994
Universal Precautions	4219.43	2/22/1994
Substitutes	4221	2/22/1994
Limited-Term Employment	4221.1	Policy Unavailable
Short-Term Employees	4221.2	2/22/1994
Emergency Appointments	4221.3	2/22/1994
Civic Center Assignments	4221.4	2/22/1994
Teacher Aides/Paraprofessionals	4222	9/13/2007
Summer School Assignments	4224	2/22/1994
Temporary Athletic Team Coaches	4227	2/22/1994
Inservice Education/Visitations; Conferences	4231.3	2/22/1994
Publication or Creation of Materials (includes copyrights and patents)	4232	2/22/1994
Travel Expenses	4233	2/22/1994
Soliciting and Selling	4235	2/22/1994
Nonschool Employment	4236	2/22/1994
Agreement	4241	2/22/1994
Concerted Action/Work Stoppage	4241.6	2/22/1994
Negotiations/Consultation	4243	2/22/1994
Public Notice — Personnel Negotiations	4243.1	2/22/1994
Complaints	4244	2/22/1994
Salary Guides (see 4151)	4251	2/22/1994
Salary Checks and Deductions	4252	2/22/1994
Health and Welfare Benefits	4254	2/22/1994
Awards and Recognition	4256.2	2/22/1994
Employee Property Reimbursement	4256.3	2/22/1994
Employee Safety	4257	2/22/1994
Employee Security	4258	2/22/1994
Leaves	4261	2/22/1994
Personal Illness/Injury Leave	4261.1	11/14/2018
<b>Management, Supervisory and Confidential Personnel</b>		
Management, Supervisory and Confidential Personnel	4300	2/22/1994
Recruitment and Selection	4311	1/17/2008

<b>Series 4000: PERSONNEL</b>	<b>Board Policy #</b>	<b>Last Revised</b>
<b>Management, Supervisory and Confidential Personnel</b>		
Affirmative Action	4311.1	2/22/1994
Legal Status Requirement	4311.2	2/22/1994
Oath or Affirmation	4312.3	2/22/1994
Health Examinations	4312.4	2/22/1994
Criminal Record Check	4312.5	9/13/2007
Personnel Records	4312.6	2/22/1994
Employment References	4312.61	2/22/1994
Employment of Relatives	4312.8	2/22/1994
Signed Statements	4312.9	2/22/1994
Load/Scheduling/Hours of Employment	4313.1	2/22/1994
Promotion/Demotion/Reclassification	4313.2	2/22/1994
Temporary Modified and Alternative Duties Return to Work Program	4313.4	4/11/2000
Transfer/Reassignment	4314	2/22/1994
Evaluation/Supervision	4315	2/22/1994
Staff Evaluating Teachers	4315.1	9/23/1997
Early Retirement Consultancy Contract	4317.12	1/17/2008
Resignation	4317.2	2/22/1994
Personnel Reduction (Layoff/Rehire)	4317.3	2/22/1994
Civil and Legal Rights	4319.1	9/13/2007
Sexual Harassment	4319.11	8/18/2020
Duties of Personnel	4319.13	2/22/1994
Codes of Ethics (see 4119.21)	4319.21	2/22/1994
Unauthorized Release of Confidential/Privileged Information	4319.23	2/22/1994
Political Activities of Employees	4319.25	10/13/2011
Employees with Infectious Disease [sic]	4319.41	2/22/1994
Exposure Control Plan for Bloodborne Pathogens	4319.42	2/22/1994
Universal Precautions	4319.43	2/22/1994
Temporary Athletic Team Coaches	4327	2/22/1994
Staff Development	4331	2/22/1994
Inservice Education/Visitations; Conferences	4331.3	2/22/1994
Publication or Creation of Materials (includes copyrights and patents)	4332	2/22/1994
Travel Expenses	4333	2/22/1994
Soliciting and Selling	4335	2/22/1994
Nonschool Employment	4336	2/22/1994
Complaints	4344	2/22/1994
Compensation and Related Benefits	4350	2/22/1994
Salary Guides	4351	2/22/1994
Salary Checks and Deductions	4352	2/22/1994
Extra Pay for Extra Work	4353	2/22/1994
Health and Welfare Benefits (see 4154)	4354	2/22/1994
Tax Sheltered [sic] Annuities	4355.1	2/22/1994

Series 4000: PERSONNEL	Board Policy #	Last Revised
<b>Management, Supervisory and Confidential Personnel</b>		
Awards and Recognition	4356.2	2/22/1994
Employee Property Reimbursement	4356.3	2/22/1994
Employee Safety	4357	2/22/1994
Employee Security	4358	2/22/1994
Leaves	4361	2/22/1994
Vacation/Holidays	4362	2/22/1994

**Source:** District-provided information.

\*Although the district's website refers to this board policy as "Security/Credit Check," the title of the policy itself is "Criminal Record Check."

The district's board policies are significantly outdated, with some dating back to 1994. FCMAT could not determine whether any board policies have been updated or revised since their initial approval. As a result, the district would benefit from using Section 16 of the FHRA, titled "Leadership and Stability," to monitor and implement best practices for board policy revision and adoption. Below are the questions pertaining to board policies found in this section:

- 16.5 Does the governing board adopt and revise policies and administrative regulations annually?
- 16.6 Are newly adopted or revised policies and administrative regulations implemented, communicated and available to staff?
- 16.7 Do all board members attend training on the budget and governance at least every two years?

If a district cannot answer "Yes" to all the questions above, it risks failing Section 16 of the FHRA. At the time of fieldwork, the district could not answer "Yes" to these questions.

After reviewing or revising its board policies, the district will need to communicate any changes or updates to employees in a clear and timely manner. Effective methods include employee meetings, memos, and updated handbooks. Clear communication helps prevent confusion and ensures that all employees understand their rights and responsibilities.

## Recommendations

*The district should:*

1. Collaborate with appropriate departments to review and revise its board policies, especially those within Series 4000: PERSONNEL, and communicate any changes to staff.
2. Conduct an immediate, thorough review of all board policies to ensure compliance with all relevant laws.
3. Review board policies annually to ensure they align with legal requirements, industry standards and best practices.

## Job Descriptions

School districts are required by the California Education Code, as well as other state and federal employment laws including the Fair Labor Standards Act and Americans with Disabilities Act (ADA), to develop and maintain job descriptions for all staff positions. These laws mandate that employers properly classify positions and compensate employees based on their job duties and responsibilities. Accurate job descriptions are integral to effective personnel management and play a key role in recruitment, ensuring that candidates are hired into positions for which they are qualified based on their knowledge, skills and abilities.

Each job description should provide candidates and employees with a clear understanding of the position and its responsibilities. A comprehensive job description should include the following major elements:

- **Job Title:** The job title should accurately reflect the position and its authority and responsibilities. This can help ensure compliance with state and federal employment laws, such as those pertaining to wage and hour regulations and overtime eligibility.
- **Purpose:** The job's purpose should be clearly defined, including the position's overall goals and objectives. This can help ensure that the position is properly classified and compensated in accordance with applicable employment laws and regulations.
- **Duties and Responsibilities/Essential Functions:** A thorough description of the position's specific duties and responsibilities should be included, outlining the tasks and functions that the employee will be responsible for. This can help ensure that the position is classified correctly and that employees are paid in accordance with their job duties and responsibilities.
- **Minimum Qualifications:** The minimum qualifications required for the position should be stated clearly, including the education, experience, credentials or certifications necessary for the job. This can help ensure compliance with employment laws related to hiring and equal employment opportunity.
- **Preferred Qualifications:** Any preferred qualifications, such as additional education or experience that may be beneficial for the position, can also be included if they do not discriminate against any classes of people who are protected under employment laws.
- **Working Conditions:** A description of the working conditions associated with the position should be included, such as the physical demands of the job, work schedule, and any other relevant information. This can help ensure compliance with employment laws related to workplace safety and with accommodations for employees with disabilities.

Use of these elements can help school districts ensure that they comply with legal requirements and guidelines. School districts can also use their job descriptions to set goals and objectives to align each employee's performance with the organizations' goals and desired outcomes. Furthermore, job descriptions can help identify areas where an employee may need more training or development. They also serve as a tool for management to ensure that employees meet performance expectations. Management can help employees who are not meeting the requirements outlined in their job descriptions by giving them feedback and coaching to improve their skills.

Regular updates to job descriptions are essential to keep them aligned with current organizational needs, rather than past requirements. Thus, it is imperative to list governing board approval or revision dates on job descriptions to ensure they are being kept up to date. While job descriptions need to include the essential duties of the position, they should also offer flexibility to allow for the assignment of duties not explicitly listed. A well-crafted job description provides candidates with information about job requirements, estab-

lishes expectations for employee evaluation, and discourages employees from shifting their responsibilities to others.

Comprehensive job descriptions are vital for maintaining compliance with the Americans with Disabilities Act, which requires that employers make reasonable accommodations for employees with disabilities. Job descriptions should state the essential functions of a position, including tasks that cannot be removed without changing the job's nature. Accurate job descriptions can help school districts determine reasonable accommodations for employees with disabilities that do not compromise the fundamental duties of the positions. School districts should avoid listing requirements that are not essential to the job.

The Americans with Disabilities Act (ADA) requires the use of an interactive process in which employers engage in a dialogue with employees or job applicants with disabilities to determine whether a reasonable accommodation can be made that would enable them to perform the essential functions of the job. The interactive process is an ongoing conversation that involves sharing information about the employee's limitations and the job's requirements, as well as accommodations that may be effective. The goal is to identify an accommodation that enables the employee to perform their job without creating an undue hardship on the employer. Employers can be held liable for their failure to engage in the interactive process and/or to provide reasonable accommodations.

Current job descriptions need to be established for each type of work performed by classified employees in accordance with Education Code 35020. The job descriptions should comply with relevant employment laws and regulations, including ADA requirements. Accurate and up-to-date job descriptions are important to help employees understand the responsibilities, requirements, and expectations of their position.

The district provided FCMAT with job descriptions for positions within the Human Resources Department; however, these are not available on the district's website. During interviews, human resources staff indicated that the job descriptions are being updated, a process that began approximately one year ago. Table 3 below details the job descriptions in the Human Resources Department and their status at the time of fieldwork.

**Table 3. Overview of job descriptions and their statuses within El Rancho Unified School District's Human Resources Department.**

Job Title	Status
Teacher Support Coordinator	No date listed
Personnel Assistant	Last reviewed in 2014
Credential Analyst	Last revised in March 2007
Personnel Secretary	Last reviewed in 2014
Data Processing Clerk	Last reviewed in 2014

**Source:** District-provided information.

It has been at least ten years since the district last reviewed and revised the job descriptions for the Human Resources Department. FCMAT found that this issue is not confined to human resources; some district job descriptions date back to 1980. Job duties and responsibilities can change over time because of advances in technology, shifting district needs, evolving industry standards, and other factors. As a result, outdated job descriptions may not accurately indicate each position's current requirements, potentially leading to confusion about responsibilities among district staff and job applicants. Furthermore, staff stated that some of these job descriptions have caused issues during state and federal reviews because they reference obsolete state policies.

The Human Resources Department divides duties between those related to certificated employees and those related to classified employees. The credentials analyst job description specifically involves work related to certificated personnel, while the personnel secretary job description includes responsibilities for both certificated and classified personnel. Despite this, the secretaries are only processing classified employees. This division of labor limits the type of service that staff can provide to both internal and external customers. Consequently, if the credentials analyst is on vacation or leave, the department's ability to serve certificated employees is compromised. To address this issue, the district would benefit from reallocating job duties to enable other staff members to process certificated employees as well.

## Recommendations

*The district should:*

1. Immediately conduct a thorough review of all job descriptions, and revise them as necessary.
2. Assign duties related to both classified and certificated staff to all personnel secretary positions.

## Leave Management

Leave management is the process of managing various types of leave requests, including holidays, sick leaves, vacation, emergencies and parental leave. This process involves following a set of rules established by the LEA, such as board policies, administrative regulations, and relevant state and federal laws, as well as collective bargaining agreements.

Ensuring compliance with state and federal laws, collective bargaining agreements, and disability coverages for leaves is complicated, and errors can have significant consequences for both the LEA and its employees. Therefore, leave management duties need to be assigned to positions that can oversee the process from start to finish. This helps staff develop expertise in leave management, which in turn enables them to provide employees with the support and resources needed to navigate the leave process smoothly. Extended leave, whether for a new child or a serious illness, can be a stressful time for employees. It is crucial they be given the information needed to make informed decisions.

In LEAs, the Human Resources Department plays a crucial role in ensuring compliance with legal regulations and managing employee leaves. To apply leave policies consistently, fairly and accurately, human resources staff need to be highly trained and knowledgeable in the intricacies of leave management. LEAs should ensure that staff receive cross-training on both certificated and classified staff leaves and receive annual updates or training on leaves of absence. Inadequate training or outdated knowledge can result in improper or even unlawful processing of leaves, which can expose the LEA to significant legal risks and liabilities.

Some human resources staff indicated that they have not received any training on leaves of absence. Additionally, the district's board policy on leaves for certificated, classified and management staff has not been updated since 1994. These issues could lead to noncompliance with legal requirements when processing leaves.

Providing training to all Human Resources Department staff is crucial for maintaining smooth operations and timely handling of leave requests. More importantly, it helps ensure that leaves of absence are processed in accordance with the law. Training multiple staff members in leave management also promotes

efficient and accurate handling of leave requests. This approach not only provides the necessary support to employees but also minimizes disruptions by enabling staff to cover for colleagues who are absent.

Best practice dictates that both human resources and payroll staff collaborate closely when processing leaves. Human resources staff work with the employee to ensure the leave is applied and processed correctly, while payroll staff ensure that the employee is paid in accordance with the law, the respective collective bargaining agreement, and board policy.

Section 9, of FCMAT's FHRA, titled "Employee Benefits," could be particularly beneficial for the district in monitoring best practices for benefits, specifically regarding leave management. Below is the question related to leaves included in this section:

9.5 Does the district track, reconcile and report employees' compensated leave balances?

If a district cannot answer "Yes" to this question, it is at risk of failing Section 9, thereby increasing the district's overall risk of insolvency.

Interviews indicated that despite previous training (as discussed within the "Staff Training" subsection of this report), human resources staff are not proficient in using Frontline for leave tracking and processing. They would benefit from additional training on Frontline's leave tracking module. Additionally, human resources staff reported lacking access to employees' leave information and accruals. This issue was further highlighted during interviews with district staff, who provided varying responses about who has access to this information. The district needs to ensure that human resources staff have adequate access to the leave data needed to effectively manage and process leaves.

Moreover, it is essential for human resources and payroll staff to meet regularly to review and discuss leaves and ensure they are processed correctly. A lack of coordination can lead to errors in leave processing, resulting in overpayments or underpayments to employees, among other issues. Given the complexity and time demands of leave management, it is vital that the Human Resources Department staff receive adequate support. Providing additional training, ensuring access to necessary leave data, and fostering collaboration between human resources and payroll staff can help improve operational efficiency. These measures will not only create a more effective Human Resources Department but also improve customer service.

## Recommendations

*The district should:*

1. Develop and support ongoing professional training for human resources staff on managing leaves of absence.
2. Regularly review and revise board policies in accordance with any recent changes in law, and keep staff informed of these updates.
3. Provide human resources staff with training on Frontline.
4. Ensure that human resources staff have the appropriate level of access to employees' leave information and accruals within Frontline.
5. Schedule regular joint meetings of the human resources and payroll staff to ensure that leaves are reconciled according to the standards outlined in FCMAT's FHRA.

## Recruitment, Selection and Hiring Practices

Recruiting staff is a critical function of the district’s Human Resources Department that must be conducted in a legal, efficient and timely manner. This ensures services and operational support for students continue without interruptions, positions are fully staffed to alleviate the workload of existing employees, and the district remains competitive in attracting highly qualified candidates. Furthermore, a well-managed process respects candidates’ time and efforts, contributing to the organization’s reputation for professionalism and competence.

An effective recruitment process involves actively seeking qualified candidates for open positions. This typically involves posting job vacancies, initiating direct contact with qualified candidates, developing partnerships with programs that encourage pathways to employment, and implementing strategies to attract pools of qualified candidates. Such an approach is particularly crucial for hard-to-fill positions, which require targeted and adaptive measures that are responsive to current workforce trends.

Selection procedures include screening applicants, selecting candidates for consideration, conducting interviews, performing reference checks, and extending offers of employment. Depending on the position, LEAs may also have testing requirements and additional screening activities during this stage. Best practice is for the hiring manager to be involved in the screening process to directly assess a candidate’s experience and qualifications. The hiring manager’s expertise and understanding of the job’s specific requirements are crucial in determining whether a candidate is qualified.

During interviews, internal hiring managers expressed frustration with the Human Resources Department’s recruitment, selection and hiring practices. They highlighted several issues, including:

- Significant delays in approving and posting vacancies, scheduling interviews, notifying candidates, and onboarding.
- Poor communication from the Human Resources Department to hiring managers and candidates.
- A lack of transparency regarding recruitment milestones, which are tracked by human resources staff but not shared with hiring managers.
- Exclusion from participating in the screening process.
- The requirement that hiring managers conduct reference checks for candidates.
- The lack of training on how to conduct reference checks.

The district’s hiring and onboarding procedures are outlined in table 4 below.

**Table 4. Overview of the hiring and onboarding processes and the staff and/or departments responsible for each at El Rancho Unified School District.**

Process	Staff Responsible
Identify vacancy/need for a position	School or department hiring manager
Submit personnel requisition electronically via School Stream platform	School or department hiring manager
Route personnel requisition through a multistep approval process involving six to seven approvers	School or department manager Human Resources Department Business Services Department Educational Services Department for positions that are categorically funded Human resources director
Prepare posting	Credential analyst for certificated positions
	Personnel secretary for classified and unclassified positions

Process	Staff Responsible
Post position <ul style="list-style-type: none"> <li>• Certificated positions: open to internal and external applicants until filled</li> <li>• Classified positions: posted internally for six calendar days* before being opened to external candidates</li> <li>• Unclassified positions: posted internally and externally for six calendar days</li> <li>• Administrative positions: posted internally for six calendar days</li> </ul>	Credential analyst for certificated positions Personnel secretary for classified or unclassified positions
Screen applicants	Not defined
Determine interview logistics	Not defined
Conduct interviews	Not defined
Perform reference checks	School or department hiring manager
Extend job offer and send regrets to unselected candidates	Credential analyst for certificated positions Personnel secretary for classified and unclassified (e.g., confidential) positions
Complete clearance process (e.g., background check and fingerprint)	Not defined
Obtain governing board approval	Personnel assistant

Source: District-provided information.

\*Per Article XVII, Transfers, Section 2, Lateral Transfers of the district’s contract with Classified School Employees Association (CSEA), Chapter 107.

## Problematic Recruitments

Following are two recent examples of problematic recruitments.

### Example #1 - Clerk/Typist Replacement Vacancy (Classified Position)

According to interviews with staff and documents provided by the district, a school submitted a personnel requisition to hire a replacement clerk/typist for a vacant position in October 2023. However, the position was not posted for internal candidates until January 25, 2024, three months later. It closed on February 1, 2024, without any applicants. This posting complied with the district’s CSEA contract, which requires that positions be posted internally for transfers and promotions for six calendar days before opening to external applicants. The position was then reposted for external applicants on February 21, 2024, and closed on February 28, 2024. Testing for the position occurred on March 12, 2024, and interviews were conducted on March 20, 2024. A candidate was finally selected for onboarding, with governing board approval scheduled for April 16, 2024. The entire hiring process spanned 171 days (approximately 5 and a half months), as detailed in table 5 below.

**Table 5. Overview of hiring processes and their timelines at El Rancho Unified School District.**

Process	Timeline
Personnel requisition approval/Posting preparation	3 months
Posting	34 days*
Applicant screening to candidate testing	12 days
Candidate testing to candidate interviews	8 days
Candidate approval and onboarding	27 days
<b>Total</b>	<b>171 days</b>

Source: District-provided information.

\*The position was posted for a total of 14 days with 20 days between the internal and external postings.

The problems with this recruitment stemmed from several factors: the lengthy approval and preparation process for posting, the brief duration the job was posted, and the extended period between candidate selection and governing board approval. The practice of adhering to the CSEA contract's internal posting requirement further exacerbates these delays, prolonging the recruitment and filling of classified vacancies.

### **Example #2 - Teacher Vacancy (Certificated Position)**

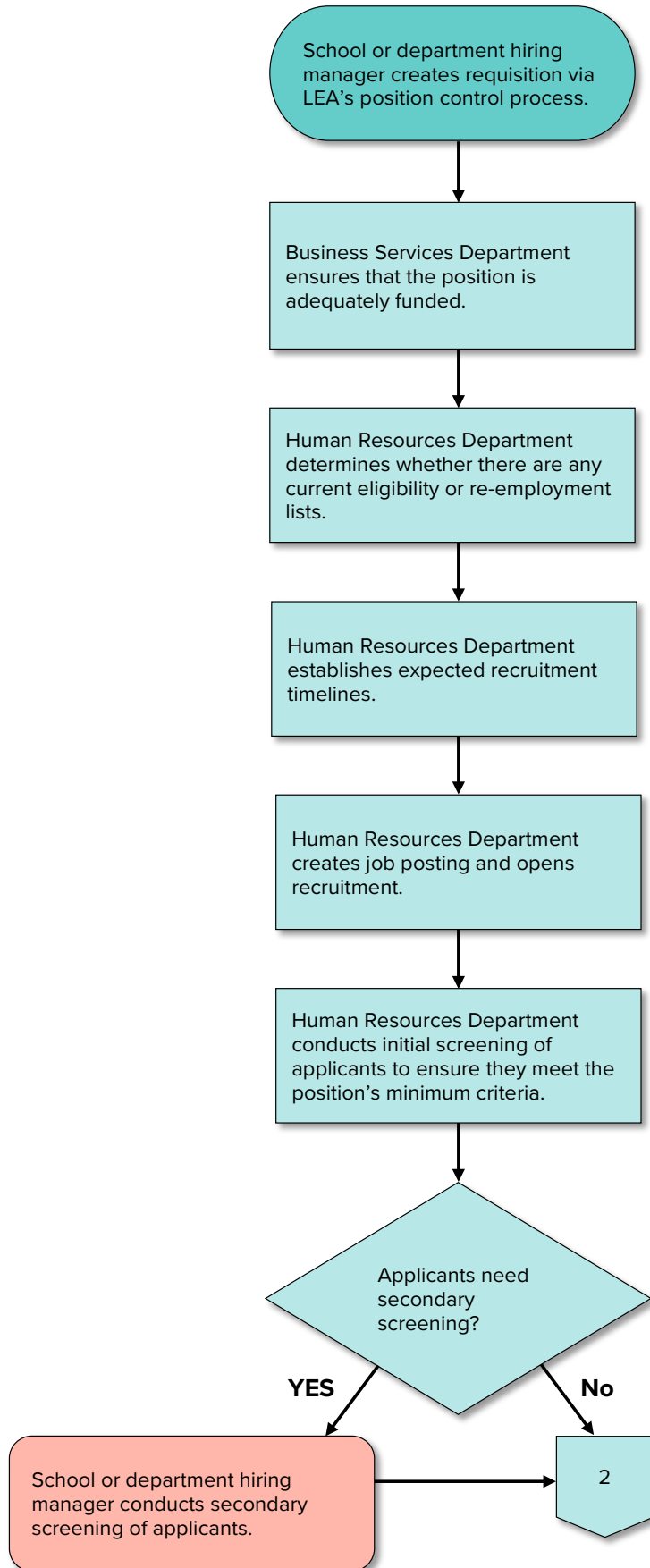
Staff interviews indicated that a special education teacher - moderate severe stated their intention to retire effective November 2023. Although the district was informed of this impending retirement in August 2023, the Human Resources Department did not post the position until after the governing board approved the retirement at the December 2023 board meeting. Best practice is to proactively hire for positions known to be difficult to recruit for, which is especially pertinent in this case given the shortage of special education teachers. As of the time of fieldwork, the district had yet to fill the position and was relying on contracted services to meet student needs, thereby incurring higher costs.

## **Improving the Recruitment Process**

The district acknowledges that its recruitment and hiring processes do not meet its needs and often result in the loss of well-qualified candidates due to lengthy delays. Additionally, Human Resources Department staff recognize that they lack procedures for keeping hiring managers informed about the status of recruitments. To increase efficiency and establish a cohesive recruitment process for both certificated and classified positions, the district needs to revise the processes that are contributing to these significant hiring delays. It is essential to establish clear, detailed written procedures and timelines for recruitment. This will help ensure that human resources staff and hiring managers fully understand their roles and the steps involved in the process.

To address challenges and align with best practices, the district needs to develop a standard recruitment flowchart. Figure 2 on the following pages provides an example of a recruitment process flowchart, which presumes the district is filling a position that has already received governing board approval.

### Recruitment Process Flowchart Example



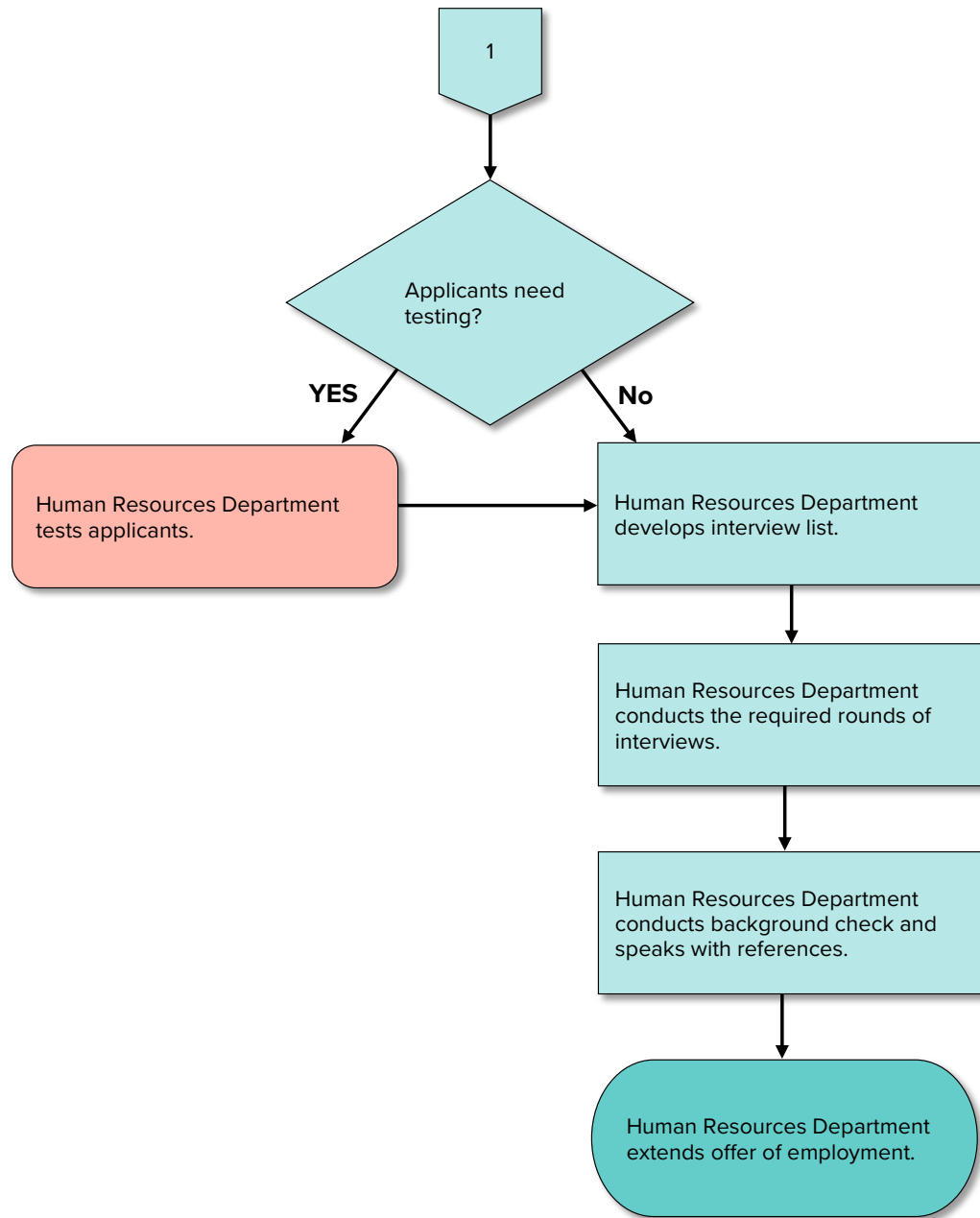


Figure 2. Example of a recruitment process flowchart.

Source: FCMAT.

Note: This flowchart presumes that the LEA’s governing board has already approved the position.

The district can use figure 2 to help revise its recruitment process. Involving staff from various levels in this process is crucial, as their expertise will contribute to creating a transparent, efficient, and user-friendly recruitment process. The flowchart should clearly identify the individuals responsible for each task and outline the expected timeframes for completion. This clarity will not only facilitate smoother operations but also ensure accountability among staff.

## Recommendations

*The district should:*

1. Post classified positions concurrently to transfer, promotional and external candidates to shorten the recruitment timeline.
2. Develop a recruitment flowchart that outlines the responsibilities of specific staff members for each step and the expected or target timeframes for their completion.
3. Ensure that the Human Resources Department keeps hiring managers up to date on active recruitments by developing a communication and tracking tool that outlines milestones and the expectations associated with them.

## Screening Process

During interviews, hiring managers expressed concerns about being excluded from the applicant screening process. They believe this leads to missed opportunities to consider qualified candidates who are prematurely screened out by human resources, particularly for technical positions for which it is difficult to discern whether an applicant meets the criteria.

The best practice involves human resources staff conducting the initial screening to ensure candidates meet the position's minimum qualifications, as stated in the job description. The hiring manager of the department with the vacancy should then perform a secondary screening to evaluate applicants' experience and its alignment with the job responsibilities and other established, uniformly applied criteria. Candidates who successfully pass this secondary screening should then be advanced to the first round of interviews.

## Recommendations

*The district should:*

1. Consider revising its screening procedure so that designated Human Resources Department staff conduct an initial screening of applicants to verify that they meet the minimum qualifications.
2. Establish predefined criteria and standard methods for evaluating applicants before recruiting for each position.

## Reference Checks

Reference checks can provide useful information about job applicants. However, some employers expressed concerns about the possibility of defamation lawsuits from former employees if they provide negative information during these checks. To address these concerns, California and several other states have enacted laws that protect employers from defamation claims made by former employees.

Under California law, truthful communications about a current or former employee's job performance or qualifications are considered privileged if they are based on credible evidence and made without malice, as outlined in Civil Code 47(c). This includes responses to questions such as, "Would you rehire this employee?" Additionally, following the enactment of Assembly Bill 2770, effective January 1, 2019, employers are permitted to disclose whether a decision not to rehire was based on the employer's determination

that the former employee engaged in sexual harassment. However, California employers are restricted from accessing a broad range of criminal records, including arrests that did not result in a conviction. Given these legal complexities, it is essential for all LEAs to maintain a consistent, legally defensible process for conducting and responding to reference checks. Information obtained informally from nonemployment sources should not be used in employment decisions.

During interviews, managers voiced concerns about a new requirement from the Human Resources Department that school or department managers perform reference checks for potential hires. Staff indicated that they have not received written procedures or guidance on conducting these checks, which could lead to inconsistencies in the process. The best practice is to clearly communicate the reference check process and designate specific personnel to perform it. This could include both human resources staff and hiring managers or supervisors, provided there is a clear understanding of the circumstances under which each party is to conduct a reference check. Additionally, it is crucial for the district to use standardized reference check forms that clearly outline when and how they should be used, along with consistent opening statements and questions. Such standardization is essential to create a legally defensible process.

## **Recommendations**

*The district should:*

1. Develop, review and update as needed reference check forms for classified, certificated, and management positions, and ensure these forms include guidance and procedures for a legally defensible reference check process.
2. Provide training to all Human Resources Department staff and managers on when and how reference checks are to be conducted, and ensure the correct forms are used consistently.

# **Appendices**

## **Appendix A – Study Agreement**

## **Appendix B – Example of Human Resources Yearly Operational Calendar**

# Appendix A – Study Agreement



## FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT December 7, 2023

The Fiscal Crisis and Management Assistance Team (FCMAT), hereinafter referred to as the team, and the El Rancho 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. Review operational processes and procedures in the Human Resources Department and make recommendations for improved efficiencies, if any.
2. Evaluate the workflow and distribution of functions within the department and make recommendations for improved efficiencies, 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. \$1,100 per day for each staff member while on site, conducting fieldwork at other locations, preparing or presenting reports, or 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 \$16,500.**

- 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 at 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 El Rancho 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: Gioconda Padilla, Chief Business Official  
Telephone: (562) 826-3116  
E-mail: [g.padilla@erusd.org](mailto:g.padilla@erusd.org)

**14. SIGNATORIES**

 12-15-23  
Date  
Marcos Villegas, Ph.D., Superintendent  
El Rancho Unified School District

 12/21/23  
Date  
Michael H. Fine,  
Chief Executive Officer  
Fiscal Crisis and Management Assistance Team

# Appendix B – Human Resources Yearly Operational Calendar Example

Please [click here](#) or see page 41 for acronym definitions.

	August 1	August 15	September 5	September 19
<b>Business Services</b>	<ul style="list-style-type: none"> <li>Warrants</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> <li>Resolution: Adoption of the Appropriation (“Gann”) Limit for the District</li> <li>Unaudited Actuals</li> <li>Unaudited Financials</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> <li>45-Day Revised Budget</li> </ul>
<b>Educational Services</b>	<ul style="list-style-type: none"> <li>NPS Placement</li> </ul>	<ul style="list-style-type: none"> <li>Independent Study (if needed)</li> </ul>	<ul style="list-style-type: none"> <li>Consolidated Application</li> </ul>	
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> <li>Quarterly Williams Report (April-June)</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> <li>Resolution: Week of the Administrator</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> </ul>
<b>Superintendent</b>	<ul style="list-style-type: none"> <li>Minutes</li> <li><b>Report Out</b></li> <li>Superintendent Employment Agreement</li> <li>Interim Superintendent Employment Agreement</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> <li>Location and Grade Configuration</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>
<b>Governing Board</b>	<ul style="list-style-type: none"> <li>Annual Committee Assignments (LCAP/fiscal efficiency)</li> <li>Student Board Member Oath</li> </ul>	<ul style="list-style-type: none"> <li><b>Board Workshop</b></li> <li>Strategic Planning and Board Priorities (4:30 PM)</li> </ul>		<ul style="list-style-type: none"> <li><b>Closed Session</b></li> <li>Superintendent Council-School Site Council (3-16 minutes)</li> </ul>
<b>Governing Board Study Session</b>	<ul style="list-style-type: none"> <li>Outdoor Learning and Nutritional Spaces</li> <li>Organizational Priorities</li> <li>Strategic Action Plan</li> <li>Study Session Planning for 2024-25</li> </ul>	<ul style="list-style-type: none"> <li>Beginning of School Staffing Update (certificated and classified)</li> </ul>	<ul style="list-style-type: none"> <li>Teacher of the Year</li> <li>High School Credit Analysis</li> <li>Summer School 2024 – Summary</li> </ul>	<ul style="list-style-type: none"> <li>Strategic Planning</li> <li>Technology Report</li> <li>ROP Report (annual)</li> </ul>

	October 3	October 17	November 7	December 5
<b>Business Services</b>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• LCAP and Budget</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• 1st Interim Financial Report and Charter School (due to COE by 12/15)</li> </ul>
<b>Educational Services</b>	<ul style="list-style-type: none"> <li>• Resolution: Sufficiency Instructional Materials (due by the 8th week of instruction)</li> <li>• LCAP and Budget</li> </ul>		<b>Action</b> <ul style="list-style-type: none"> <li>• Annual School Site Safety Plans (must be board-approved by March 1)</li> </ul>	
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Quarterly Williams Report (July-September)</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• CDE Foundation Agreement (Solutions Roundtable)</li> </ul>
<b>Superintendent</b>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>
<b>Governing Board</b>	<b>Closed Session</b> <ul style="list-style-type: none"> <li>• Superintendent Evaluation</li> <li>• Negotiations</li> <li>• ESSER II</li> </ul>	<b>Closed Session</b> <ul style="list-style-type: none"> <li>• Benefits Summary</li> </ul>	<b>Closed Session</b> <ul style="list-style-type: none"> <li>• Superintendent Evaluation</li> </ul>	<b>Closed Session</b> <ul style="list-style-type: none"> <li>• Superintendent Evaluation</li> <li>• Review of Proposed Board Meeting Schedule for 2024-2025 School Year</li> </ul>
<b>Governing Board Study Session</b>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> <li>• Student Enrollment Update (including IDA patterns)</li> <li>• Certificated Staffing for our Schools</li> <li>• The State of Transitional Kindergarten in ERUSD</li> </ul>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Services (attendance trends and chronic absenteeism)</li> <li>• California Assessment of Student Performance and Progress Results</li> <li>• Nutrition Services Update</li> <li>• Strategic Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• California Assessment of Student Performance and Performance</li> </ul>	<ul style="list-style-type: none"> <li>• Student and Program Recognition</li> </ul>

Responsible Party	December 19	January 16	February 6	N/A
<b>Business Services</b>	<ul style="list-style-type: none"> <li>• Warrants</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> </ul>	
<b>Educational Services</b>			<ul style="list-style-type: none"> <li>• Coordinated Comprehensive Early Intervention Services Review</li> </ul>	
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Quarterly Williams Report (October-December)</li> <li>• Calendar Committee Recommendations (if ready)</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Calendar Committee Recommendations</li> </ul>	
<b>Superintendent</b>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> <li>• Administration of Oath to Newly-Elected Board Members (election years only)</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Minutes</li> </ul>	
<b>Governing Board</b>	<ul style="list-style-type: none"> <li>• Board Reorganization (annual)</li> <li>• Board Meeting Schedule</li> <li>• Reports: CSBA Annual Education Conference</li> </ul>	<ul style="list-style-type: none"> <li>• Superintendent Mid-Year Evaluation</li> <li>• Reports: CSBA Annual Education Conference</li> </ul>	<ul style="list-style-type: none"> <li>• Reports: CSBA Annual Education Conference</li> </ul>	
<b>Governing Board Study Session</b>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> </ul>	

	February 20	March 5	March 19	April 16
<b>Business Services</b>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• Declaration of Surplus and Authorization to Dispose</li> <li>• Audit Report</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• 2nd Interim-Financial District and KIPP (due to COE by 3/15)</li> <li>• Auditor Report due to Board</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• Declaration Of Obsolete Surplus</li> <li>• CBOC Annual Report</li> <li>• All Annual Contracts Need to be Provided to Board for Approval</li> </ul>	<ul style="list-style-type: none"> <li>• Warrants</li> <li>• Budget Planning Calendar</li> <li>• GASB 45 OPEB Financial Information</li> <li>• CBOC Annual Report</li> </ul>
<b>Educational Services</b>	<ul style="list-style-type: none"> <li>• Indian Education Agreement (\$2,500) Annual Grant (if awarded)</li> <li>• School safety plans (must be approved by March 1)</li> </ul>	<ul style="list-style-type: none"> <li>• Dual Language Immersion Update</li> </ul>	<ul style="list-style-type: none"> <li>• Health and Wellness Advisory Update</li> </ul>	
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Annual Declaration of Need for Fully Qualified Educators</li> <li>• Calendar Committee Recommendations</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Non-Reelect Probationary and Temporary Teacher (due by March 15)</li> <li>• Resolutions: Reduction in Workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Bus Driver Recognition</li> <li>• Resolution: Teacher Week</li> <li>• Resolution: Classified Employees Week</li> <li>• Resolution: School Nurse</li> </ul>	<ul style="list-style-type: none"> <li>• Certificated and Classified Staff Report</li> <li>• Substitute Pay Rate Change</li> </ul>
<b>Superintendent</b>	<ul style="list-style-type: none"> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes</li> </ul>
<b>Governing Board</b>		<ul style="list-style-type: none"> <li>• Board Graduation Assignments</li> </ul>	<ul style="list-style-type: none"> <li>• Joint Meeting with Personnel Commission</li> </ul>	<ul style="list-style-type: none"> <li>• Recruitment for Student Board Member, 2024-25 School Year</li> </ul>
<b>Governing Board Study Session</b>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Student/Program Recognition</li> <li>• Student Reports</li> <li>• Health and Wellness Advisory Committee Update</li> <li>• Annual Art Show at the District Office Announcement</li> </ul>	<ul style="list-style-type: none"> <li>• ACSA Every Student Succeeding Awards</li> <li>• Student Reports</li> <li>• Student/Program Recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Student Reports</li> <li>• Student/Program Recognition</li> <li>• Region 6 ACSA Administrator of the Year</li> <li>• Dual Language Immersion Update</li> <li>• California Healthy Kids Survey</li> <li>• Health and Wellness Advisory Committee</li> </ul>

	May 7	May 21	June 4	June 18
<b>Business Services</b>	<ul style="list-style-type: none"> <li>Warrants</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> <li>First Read: Budget (public hearing)</li> </ul>	<ul style="list-style-type: none"> <li>Warrants</li> <li>Public Hearing and Approval of Budget</li> </ul>
<b>Educational Services</b>		<ul style="list-style-type: none"> <li>LCAP Update</li> </ul>	<ul style="list-style-type: none"> <li>First Read: LCAP (public hearing)</li> <li>First Read: Single Plans for Student Achievement</li> <li>Federal Addendum and California School Dashboard Local Indicators (annual) (Study Session items for agenda with LCAP hearing)</li> </ul>	<ul style="list-style-type: none"> <li>Approval of Single Plans for Student Achievement</li> <li>Approval of LCAP</li> </ul>
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> <li>Recognition of Teacher of the Year Honorees and Reception (district and schools)</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> <li>Recognition of Classified Employee Honorees and Reception</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> <li>Closed: Negotiations (leaves)</li> </ul>	<ul style="list-style-type: none"> <li>Certificated and Classified Staff Report</li> </ul>
<b>Superintendent</b>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>	<ul style="list-style-type: none"> <li>Minutes</li> </ul>
<b>Governing Board</b>	<p><b>Closed Session</b></p> <ul style="list-style-type: none"> <li>Assistant Superintendent and Superintendent Employment Agreements</li> <li>Superintendent Evaluation</li> </ul>	<ul style="list-style-type: none"> <li>Resolution: Notice of Board Member Election Specification of Election Order (election years only)</li> </ul> <p><b>Closed Session</b></p> <ul style="list-style-type: none"> <li>Superintendent Evaluation</li> </ul> <p><b>Closed Session and Report Out</b></p> <ul style="list-style-type: none"> <li>Assistant Superintendent and Superintendent Employment Agreements (discussion)</li> </ul>	<p><b>Closed Session</b></p> <ul style="list-style-type: none"> <li>Superintendent Evaluation</li> <li>Superintendent Agreement</li> </ul> <p><b>Study Session</b></p> <ul style="list-style-type: none"> <li>Student Advisory Council Recognition</li> </ul> <p><b>Study Session and Discussion</b></p> <ul style="list-style-type: none"> <li>Labor Management Initiative – Board Member Foundational Knowledge, Participation and Support</li> </ul>	<p><b>Closed Session</b></p> <ul style="list-style-type: none"> <li>Superintendent Evaluation</li> </ul>
<b>Governing Board Study Session</b>	<ul style="list-style-type: none"> <li>Student/Program Recognition</li> <li>Student Reports</li> </ul>	<ul style="list-style-type: none"> <li>Student/Program Recognition</li> <li>Student Reports</li> <li>Classified Employee of the Year Reception</li> <li>LCAP (preview)</li> </ul>	<ul style="list-style-type: none"> <li>Student Reports</li> </ul> <p><b>Board Discussion</b></p> <ul style="list-style-type: none"> <li>Study Sessions</li> <li>Hanover Emerging Bilingual Findings</li> </ul>	<ul style="list-style-type: none"> <li>Study Session Calendar</li> </ul>

**Acronyms Used**

ACSA – Association of California School Administrators

CBOC – Citizens' Bond Oversight Committee

CDE – California Department of Education

COE – County Office of Education

CSBA – California School Boards Association

ERUSD – El Rancho Unified School District

ESSER – Elementary and Secondary School Emergency Relief

GASB – Governmental Accounting Standards Board

IDA – Inter-/Intradistrict Agreement

LCAP – Local Control and Accountability Plan

NPS – Nonpublic School

OPEB – Other Post-Employment Benefits

ROP – Regional Occupational Program