

# FCMAT

FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

## Business Support Services & Personnel Support Services Review

April 11, 2025

## Poway Unified School District

Michael H. Fine  
Chief Executive Officer

April 11, 2025

Superintendent Benjamin Churchill, EdD.  
Poway Unified School District  
15250 Avenue of Science  
San Diego, CA 92128

Dear Superintendent Churchill:

In October 2024, the district entered into an agreement with FCMAT to review the Business Support Services and Personnel Support Services divisions. Specifically, the study agreement states that FCMAT will complete the following:

1. Review operational processes and procedures in the Business Support Services (BSS) and Personnel Support Services (PSS) divisions (including Personnel Commission), and make recommendations for improved efficiency, if any, in the following areas:
  - a. New hires — internal and external (recruitment, hiring, onboarding, communication, entry in position control system, HR [human resources] employee management system and payroll system, and other challenges identified during fieldwork).
  - b. Position requisition workflow and approval, including use of technology.
  - c. Volunteer clearance.
  - d. Related customer service.

This report contains the study team's findings and recommendations. FCMAT appreciates the opportunity to serve the Poway 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

## Purpose and Services

FCMAT was created by the California Legislature to help California's transitional kindergarten through grade 14 (TK-14) local educational agencies (LEAs) avoid fiscal insolvency. Today, FCMAT helps LEAs identify, prevent and resolve financial, management, program, data, and oversight challenges; provides professional learning; produces and provides software, checklists, manuals and other tools; and offers other related school business and data services.

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

When FCMAT is asked for help with management assistance or a fiscal crisis, FCMAT management and staff work closely with the requesting LEA to meet their needs. Often this means conducting a formal study using a FCMAT study team that coordinates with the LEA for on-site fieldwork to evaluate specified operational areas and subsequently produces a written report with findings and recommendations for improvement.

For more immediate needs in a specific area, FCMAT offers short-term technical assistance from a FCMAT staff member with the required expertise.

To help meet the need for qualified chief business officials (CBOs) in LEAs, FCMAT offers four different CBO training and mentoring programs that consist of 11 or 12 diverse two-day training sessions over the course of a full year.

For agencies with professional learning needs, FCMAT offers workshops on specific topics. Popular topics include associated student body operations, use of FCMAT's Projection-Pro online financial forecasting software, use of FCMAT's Local Control Funding Formula (LCFF) Calculator, and data reporting for the California Longitudinal Pupil Achievement Data System (CALPADS). FCMAT staff and management also frequently make presentations at various professional conferences.

The California School Information Services (CSIS) service of FCMAT helps the California Department of Education (CDE) operate CALPADS; helps LEAs learn about CALPADS, resolve data issues and meet reporting requirements; and provides LEAs with training and leadership in data management. CSIS also developed and continues to host and improve the Standardized Account Code Structure (SACS) web-based financial reporting system for all California LEAs, and provides ed-data.org, which gives educators, policy-makers, the Legislature, parents and the public quick access to timely and comprehensive data about TK-12 education in California.

Since it was formed, FCMAT has provided LEAs with the types of help described above on more than 2,000 occasions.

FCMAT's administrative agent is the Kern County Superintendent of Schools. FCMAT is led by Michael H. Fine, Chief Executive Officer, and is funded by appropriations in the state budget and modest fees to requesting agencies.

Workshop schedules, manuals, presentation slide decks, Projection-Pro software, LCFF calculators, past reports, an online help desk, and many other resources are available for download or use at no charge on FCMAT's website.

# History

FCMAT was created by Assembly Bill 1200 (Chapter 1213, Statutes of 1991) and Education Code 42127.8. Assembly Bill 107 (Chapter 282, Statutes of 1997) added Education Code 49080, which charged FCMAT with responsibility for CSIS and its statewide data management work, and Assembly Bill 1115 (Chapter 78, Statutes of 1999) codified CSIS' mission.

Assembly Bill 1200 created a statewide plan for county offices of education and school districts to work together locally to improve fiscal procedures and accountability standards. Assembly Bill 2756 (Chapter 52, Statutes of 2004) gave FCMAT specific responsibilities for districts that have received emergency state loans.

In January 2006, Senate Bill 430 (Chapter 357, Statutes of 2005) amended Education Code 42127.8, and Assembly Bill 1366 (Chapter 360, Statutes of 2005) amended Education Codes 42127.8 and 84041. These new laws expanded FCMAT's services to include charter schools and community colleges, respectively.

Assembly Bill 1840 (Chapter 426, Statutes of 2018) changed how fiscally insolvent districts are administered once an emergency appropriation has been made, shifting oversight responsibilities from the state to the local county superintendent to be more consistent with the principles of local control, and giving FCMAT new responsibilities associated with the process.

# Introduction

## Background

The Poway Unified School District serves approximately 35,738 students<sup>1</sup> in transitional kindergarten through grade 12 across the cities of San Diego and Poway, California. According to [Ed-Data.org](https://www.ed-data.org/), enrollment has declined by an average of approximately 400 students per year since the 2019-20 fiscal year. The district, governed by a five-member board of education, continues to provide a range of educational programs and services to meet student needs.

## Study and Report Guidelines

In October 2024, the Poway Unified School District and the Fiscal Crisis and Management Assistance Team (FCMAT) entered into an agreement for FCMAT to conduct a review of the operational processes and procedures within the district's Business Support Services and Personnel Support Services divisions, focusing on the new hire process, position requisition workflow, volunteer clearance, and related customer service.

FCMAT conducted an on-site visit to the district from December 16-19, 2024, and held virtual meetings on January 13, 14 and 17, 2025, to interview district and school staff, collect data and review documents. Following the 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; it does not generally comment on those that may be functioning well. In writing its reports, FCMAT uses the Associated Press Stylebook and its own short, internal style guide, which emphasize plain language, capitalize relatively few terms, and strive for conciseness, clarity and simplicity.

## Study Team

The study team was composed of the following members:

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FCMAT Intervention Specialist

John Von Flue  
FCMAT Chief Analyst

Alyssa Low  
FCMAT Consultant

Cassady Clifton  
FCMAT Technical Writer

Those members of this study team who are otherwise employed by a local educational agency were not representing their respective employers but were working solely as independent contractors for FCMAT.

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

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<sup>1</sup>California Department of Education. (n.d.). *Poway Unified School District*. Ed-Data. Retrieved February 18, 2025 from <https://www.ed-data.org/district/San-Diego/Poway-Unified>.



# Executive Summary

## Hiring Process

The Poway Unified School District faces significant challenges in recruitment. The district's hiring approval system is inefficient, requiring a complex process with up to 17 steps that, according to district documents, takes an average of 125 days to complete. Despite transitioning to an electronic workflow in 2023, the process remains slow due to frequent errors and staff absences.

Additionally, the district's decentralized hiring model — where site administrators oversee recruitment — results in inconsistencies and inefficiencies, particularly in classified and certificated hiring. Communication gaps between divisions exacerbate delays and redundancy, leading to staff confusion and frustration. Further, the personnel commission's role in hiring and overseeing classified staff is not well understood, limiting its effectiveness and integration within district operations.

## Onboarding and Offboarding

Inefficiencies in the district's employee transition processes hinder both the integration of new hires and the smooth departure of outgoing staff. The district's onboarding process is disjointed, relying primarily on electronic document submission with minimal in-person engagement. New employees reported receiving little information about compensation, benefits, or job-specific training before starting, impacting their satisfaction and productivity. The district also lacks a formal offboarding process, increasing the risk of incomplete documentation and loss of institutional knowledge.

## Position Control

The district's position control system<sup>2</sup> is inefficient and fragmented, relying on multiple nonintegrated platforms such as Digital Schools and Informed K12. This lack of cohesion causes discrepancies and delays, hindering the district's ability to manage staffing, budgets, and financial processes. Poor communication between personnel support services and business support services further disrupts workflows because staff are unclear on divisional procedures. These issues are compounded by inconsistent training, inadequate cross-divisional collaboration, and the absence of structured information-sharing practices.

## Volunteer Management

The district's volunteer management system is unclear, inefficient and strained by the high volume of volunteers. Annual reapplication requirements, even for previously cleared volunteers, and unclear classification guidelines create unnecessary administrative burdens. Although the district is implementing a new electronic system to streamline the process, concerns remain regarding staff communication and involvement in the volunteer management process.

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<sup>2</sup>The position control system tracks personnel costs and budgets.



# Findings and Recommendations

This section presents FCMAT's findings and recommendations on the operational processes and procedures within the Business Support Services and Personnel Support Services divisions, focusing on the new hire process, position requisition workflow, volunteer clearance, and related customer service.

## Divisional Roles and Responsibilities

This subsection provides a brief overview of the roles and responsibilities of the Business Support Services and Personnel Support Services divisions, the number of full-time equivalent (FTE) staff supporting them, and the function of the district's personnel commission.

### Business Support Services Division

Business operations and financial management are vital to a school district's fiscal stability, resource optimization, and compliance with state and federal regulations. These functions ensure smooth daily operations and the effective management of financial resources to support student success and district priorities.

Business support services staff oversee expenditures, revenue forecasting, and financial reporting while ensuring compliance with state and federal mandates, board policies, and best financial practices. They play a crucial role in identifying financial risks and implementing mitigation strategies. Their work sustains daily operations, safeguards financial integrity, and supports the district's long-term fiscal health.

A well-functioning Business Support Services Division excels in financial analysis, strategic planning, and regulatory compliance. It provides guidance on fiscal policies and procedures, ensuring school sites and departments follow sound financial practices. Effective communication and collaboration across departments are essential to aligning financial and operational decisions with the school district's educational goals. By maintaining transparency, accountability, and efficiency, Business Support Services divisions help protect school districts from financial risks, support informed decision-making, and ensure long-term fiscal solvency.

The district's associate superintendent of business support services oversees the departments of Facilities, Maintenance and Operations; Finance; Food and Nutrition; Planning; Publications; Purchasing; Transportation; Receiving and Distribution; Finance; and Payroll.

### Personnel Support Services Division

Functions pertaining to human resources are critical to a school district's daily operations, affecting every level of the organization. The Personnel Support Services Division is responsible for coordinating all aspects of human resources, including employee recruitment, selection, onboarding and training. Personnel support services staff help with employee evaluation 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 Personnel Support Services Division to effectively manage personnel matters and develop a high-performing workforce.

Effective Personnel Support Services divisions are skilled in communication, conflict resolution, and employee development. They are proactive in providing guidance on workplace policies and practices, and

they actively solicit 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 associate superintendent of personnel support services oversees a team of 32 staff responsible for the district's human resources functions. Of these 32 positions, seven are dedicated to supporting the personnel commission function, as discussed in the "Classified Recruitment" section of this report.

## Personnel Commission

The district is one of 94 merit school districts in California.<sup>3</sup> California Education Code 45240-45320 establishes the legal framework for optional merit systems in transitional kindergarten through grade 12 (TK-12) local educational agencies (LEAs). According to the California School Personnel Commissioners Association's *Orientation Handbook for Personnel Commissioners*, the merit system is designed to ensure fair and equitable employment practices for classified (nonteaching) staff by supporting hiring and promotions based on merit, employee retention, equitable compensation aligned with job complexity, due process in disciplinary actions, and nondiscriminatory hiring practices.

Personnel commissions are independent bodies responsible for overseeing and enforcing the merit system with school districts. Each commission consists of three appointed members serving staggered three-year terms—one selected by the LEA, one by the local classified employees' association, and a third appointed jointly by the other two members. While commission members serve on a voluntary basis, they may receive health benefits.

<sup>3</sup>Personnel Commission Services. (n.d.). Merit system rules and resources. California School Personnel Commissioners Association. Retrieved February 18, 2025, from <https://meritsystem.org/>.

# Organizational Culture, Collaboration and Communication

This subsection presents FCMAT's findings and recommendations on the district's organizational culture and communication practices. It examines how communication occurs within and between divisions, the structures in place to support collaboration, and the factors influencing the district's work environment.

## Organizational Culture

Broadly defined, organizational culture is the system of shared assumptions, values, and beliefs within an entity, which provides guidance to employees on acceptable and unacceptable conduct.<sup>4</sup> This system shapes employee behavior, influencing how they dress, behave and carry out their job responsibilities. Organizational culture evolves and changes over time due to various factors, including changes in leadership. As a result, each school district has a unique organizational culture.

Organizational culture influences how a school district collaborates and communicates both internally and externally. It significantly impacts staff interactions, employee productivity and overall morale. A culture that fosters collaboration and open communication enhances innovation, problem-solving and decision-making while strengthening relationships and improving efficiency.

The district's Business Support Services and Personnel Support Services divisions highlight values related to service, problem-solving, and efficiency on their web pages:

- The Business Support Services Division's [web page](#) states its vision as:  
  
We are a team that incorporates communication, collaborative problem solving, innovation, and encourages all to grow professionally. We provide quality facilities, innovative technologies, and services in an effective, efficient, and timely manner.
- The Personnel Support Services Division's web page emphasizes a commitment to customer service, stating: "We are committed to treating you with respect and courtesy while providing the highest quality service."

Despite these stated values, interviews and observations indicate that they are not consistently reflected in daily operations. FCMAT found that a lack of communication and collaboration between these divisions has created significant barriers to efficiency and teamwork, impacting operations both vertically (between leadership and staff) and laterally (across divisions).

The district's structure appears hierarchical and fragmented, with top administrators perceived as disconnected from their subordinates, schools, and even from one another. Staff interviews revealed that historically, employees have had little access to upper management, particularly to leaders in other divisions and the superintendent. Terms frequently used to describe the district included "a culture of separation" and "siloed communication and action," reinforcing a "stay within your lane" mentality. This perceived division limits collaboration, hinders problem-solving, and contributes to inefficiencies that affect both daily operations and long-term strategic goals.

<sup>4</sup>Daft, Richard L. (2001). *Organization Theory and Design*. South-Western College Publishing.

## District Communication to Sites

Interviews and documentation indicate that communication between the district office and schools and divisions is insufficient, inconsistent and lacks a structured approach. There is no formal process for proactively sharing information, and while some handbooks and resources exist, they are not consistently distributed or easily accessible to staff.

Without a clear and structured communication process, school staff may misinterpret policies, procedures, and expectations, leading to inconsistent implementation across sites. The lack of centralized, accessible resources forces staff to rely on informal channels or develop their own solutions, resulting in wasted time, duplicated efforts and operational inefficiencies. An underused intranet further compounds these challenges, making it difficult for employees to find accurate, up-to-date information and hindering knowledge sharing across the district.

As a result, schools may experience delays in implementing district initiatives due to a lack of clear guidance or timely access to critical information. Additionally, ineffective communication limits collaboration between schools and district administrators, making it harder to align efforts, resolve issues efficiently, and maintain consistency in decision-making and policy enforcement.

## Interdivisional Communication

Interviews indicate that divisions often rely on district board meetings to obtain information because direct communication from leadership is lacking. Without a structured system for sharing updates, staff must seek out critical information independently, leading to inconsistencies in procedures, decision-making, and day-to-day operations. Additionally, each division develops its own processes and procedures with little information shared across divisions or districtwide, leaving many employees unaware of procedures outside their own division, creating inefficiencies and limiting collaboration. This lack of communication creates inefficiencies, limits collaboration, and further fragments district operations.

The absence of structured communication is further evident in the district's approach to interdivisional meetings. Finance, learning support services and personnel support services meet only during budget development, limiting opportunities for ongoing collaboration. In contrast, interviews indicated that finance and special education meet biweekly for ongoing reconciliation of instructional aides. Interviews revealed that key divisions — such as position control, payroll and finance — do not have regularly scheduled meetings. While these meetings were held in the past, they were discontinued due to low attendance and a lack of administrative support. Staff reported that misalignment among payroll, personnel support services, and business support services has further contributed to inefficiencies, hindering coordination and workflow efficiency.

The Personnel Support Services Division provided a list of interdivisional meetings, which included:

- Payroll and personnel support services meetings (held every two months) – Attended by directors, personnel support services staff, and payroll technicians to discuss operational processes.
- Finance and personnel support services meetings (held every two months) – Attended by directors and, occasionally, the lead human resources technician to discuss the position requisition process and position control.
- Learning support services and personnel support services director meetings (held every two months) – Focused on site-level issues and needs.

- Personnel support services, payroll and personnel commission staff meetings – Held in October 2023, January 2024 and April 2024.
- Personnel support services technicians and information technology staff meetings – Held in January 2024, February 2024 and September 2024.

The district did not provide any agendas or minutes for these meetings. As a result, FCMAT could not verify their frequency, attendance, or discussion topics. Further, staff interviews suggest these meetings are often limited to mandatory trainings or do not occur at all. Additionally, attendance is not required by leadership or administrators, resulting in low engagement and a lack of accountability. The absence of structured, collaborative meetings further exacerbates communication gaps, weakens interdepartmental coordination, and contributes to a strained work environment. Without consistent opportunities for discussion and alignment, divisions operate in silos, making it difficult to address challenges efficiently and maintain consistency in operations and decision-making across the district.

To enhance the effectiveness of the Personnel Support Services and Business Support Services divisions and strengthen their reputation both internally and districtwide, the district should implement regularly scheduled interdivisional meetings and ensure they are not canceled. Consistently holding these meetings demonstrates administrative commitment to fostering collaboration and improving communication across the district. They should include the following standing agenda items:

- New hires and separation effective dates.
- Onboarding dates.
- Recruitment updates.
- Training and cross-training opportunities.
- Workflow challenges and bottlenecks.
- Process improvements.
- Review of communication response times and effectiveness.

Establishing clear, structured communication between divisions will help reduce errors, streamline workflows, and promote problem-solving across divisions. Strengthening collaboration will also restore trust in leadership, improve morale, and enhance overall efficiency and effectiveness in district operations. To ensure accountability, the district should require staff attendance at these meetings.

## **Personnel Support Services Intradivisional Communication**

The Personnel Support Services Division directors meet weekly to discuss issues and share information; however, no agendas or minutes are recorded to document these meetings. Additionally, the personnel commission director meets separately with the assistant superintendent of personnel support services approximately every other week. To improve communication, collaboration, and transparency, the district needs to include the personnel commission director in Personnel Support Services Division meetings with other directors.

The district reported that Personnel Support Services Division meetings are scheduled quarterly to provide training and facilitate discussions on divisional matters. However, interviews indicated that no such meetings have occurred in the past year, and no documentation was provided to confirm that any training has taken place.

Staff expressed concerns that management is out of touch with daily operations and lacks an understanding of the division's internal processes. For example, interviewees stated that not all Personnel Support Services Division leadership are familiar with the hiring process, including the requisition approval process and the role of the personnel commission. As a result, they are unable to effectively support staff in resolving issues or addressing concerns as they arise.

Although personnel support services staff and staff supporting the personnel commission function work in the same office, which should facilitate regular interaction, interviewees provided conflicting reports about the frequency of meetings. Some indicated that meetings are held quarterly, while others described them as "rare and inconsistent," with only three or four occurring over the past two years.

The Personnel Support Services Division provided a list of intradivisional meetings, which included:

- Human resource technician meetings – held in September 2024.
- Human resource technicians, director, and administrator meetings – held in February 2023, March 2023 and February 2024.
- Human resource technician and director meetings – held in May 2023.

Despite requests for details such as agendas and minutes, no supporting documentation was provided, so FCMAT could not verify attendance records or discussion topics. Additionally, staff supporting the personnel commission function were not included in these meetings, further highlighting a breakdown in communication. This lack of engagement has contributed to a strained relationship between personnel support services and personnel commission staff and has hindered collaboration within the division. To improve communication, coordination and working relationships, the district needs to schedule weekly meetings between personnel support services and personnel commission staff to collaborate on recruitment efforts, review vacancies and ensure timely approvals.

## Recommendations

*The district should:*

1. Schedule weekly meetings between personnel support services and staff who support the personnel commission function to collaborate on recruitment efforts, review vacancies and ensure timely approvals.
2. Include the personnel commission director in Personnel Support Services Division meetings with other directors.
3. Establish regular communication channels to share district actions and priorities with divisions, sites and staff.
4. Schedule regular interdivisional and intradivisional meetings, ensuring that agendas are developed in advance and minutes are recorded and archived.
5. Require staff attendance at interdivisional meetings.
6. Ensure Personnel Support Services Division staff understand their role in maintaining efficient and timely communication.

# Staff Training

Providing comprehensive training is essential for ensuring that employees can perform their duties effectively, stay informed about evolving legal requirements and board policies, and contribute to efficient district operations. A well-trained workforce enhances productivity, reduces errors, and strengthens overall organizational effectiveness. However, employees reported that training for personnel support services, personnel commission, and business support services staff is either inconsistent or entirely lacking.

To ensure employees are equipped with the necessary skills and knowledge, the district should implement a professional development calendar to ensure that professional learning is planned, consistent, and aligned with district goals and employee needs. A professional development calendar is a structured schedule of training sessions, workshops, and learning opportunities designed to help employees enhance their skills, stay updated on best practices, and meet professional requirements. These calendars typically include:

- Mandatory trainings (e.g., compliance, safety, legal updates).
- Job-specific skill development (e.g., budget management, human resources practices, instructional strategies).
- Leadership and growth opportunities.
- Technology and systems training.
- Collaboration and networking events.

However, a professional development calendar alone is not enough. The district must also develop structured training programs tailored to each division's needs to ensure employees can apply what they learn in their daily responsibilities. Without consistent training, employee turnover or extended absences create knowledge gaps, resulting in workplace inefficiencies and the loss of institutional knowledge.

Human resources is highly technical in nature with a constantly evolving legal landscape. Errors in areas such as leave management can have serious consequences for employees and result in significant costs for the district. Documents provided to FCMAT indicate that over the past year and a half, personnel support services staff attended various external trainings on topics such as credentialing and positional control. While these trainings provided valuable information, staff reported that they had to request approval to attend rather than being proactively offered training opportunities by administration.

Moreover, personnel support services, like other divisions, lacks a structured process for staff to debrief or share knowledge after attending external trainings. As a result, information remains siloed within the attending employee or division, rather than benefiting the organization as a whole. Best practice is to offer regular internal trainings throughout the year and incorporate post-training discussions into staff meetings to ensure all employees receive the knowledge necessary to support district operations and fulfill their job responsibilities effectively.

Training gaps also extend to new hires, who indicated that they received no structured training upon joining the district. The district needs to develop a training program for both new hires and existing personnel to help fill knowledge gaps, improve technical support, and enhance overall operational efficiency. Employees feel valued when their employer invests in quality training tailored to their roles, which can lead to higher job satisfaction, increased retention, and a more capable and effective workforce. Ongoing professional development not only boosts morale but also strengthens the district's overall capacity and effectiveness.



In addition to general training, the district does not provide formal instruction on its information systems. Training on essential software, such as the district's financial system, is inconsistent, leaving employees without clear guidance on critical tasks like running reports, managing position control, and navigating other key system functions. Administration cannot fairly hold employees accountable for mistakes in systems they have not been adequately trained to use.

The district needs to create a professional development calendar for the business support services, personnel support services, technology services and personnel commission staff. This calendar should outline available training on essential district systems, such as Informed K12, Digital Schools and PeopleSoft. Providing structured training on district systems would not only equip staff with the necessary skills but also reinforce the district's commitment to employee development and operational excellence.

## Cross-Training

Cross-training prepares employees to perform tasks beyond their designated job descriptions or across various divisions within an organization. This practice strengthens a school district's overall efficiency by ensuring continuity of operations. When an employee is unavailable, a cross-trained colleague can step in to perform essential duties, preventing workflow disruptions. Additionally, having multiple employees trained in the same tasks creates a system of checks and balances, allowing errors or irregularities to be detected and corrected more easily.

Beyond operational benefits, cross-training enhances collaboration and communication by fostering a deeper understanding of different roles and responsibilities within the school district. It also strengthens stability during employee transitions, because cross-trained staff can readily assume additional responsibilities when needed. This flexibility mitigates the impact of turnover and enables employees to adapt to evolving district needs.

Cross-training also supports employee retention by offering skill development and career growth opportunities. However, it is not intended to make employees interchangeable or eliminate the need for specialized expertise. Instead, it ensures that critical operations can continue during crises or staff absences. To implement an effective cross-training program, each employee should document standard operating procedures for their key responsibilities — ideally in a desk manual format — to facilitate knowledge transfer.

During interviews, staff reported that cross-training among personnel support services, personnel commission, and business support services staff is inconsistent or, in some cases, nonexistent. Staff further indicated that if an employee responsible for classified personnel is absent, personnel support services and personnel commission staff often struggle to help school sites and divisions due to unfamiliarity with necessary tasks. This lack of cross-training limits the level of support available to divisions and school sites, reducing efficiency and service quality.

A lack of cross-training has also contributed to operational bottlenecks. For example, in the Business Support Services Division, a single staff member is responsible for processing positions. When this individual is out on vacation or sick leave, there is no backup, causing the workflow to halt entirely. This delay not only disrupts hiring timelines but also increases workloads when the backlog must be addressed upon the employee's return. As a result, site administrators attempting to fill critical positions before the start of the school year were unable to do so due to the inability of other staff to step in.

Similarly, personnel commission staff reported being overwhelmed with recruitment demands and a lack of support. Once a position is approved, they are responsible for initiating recruitment, often managing more than 60 open positions at a time. The high volume of vacancies without support slows down the hiring process, leaving school sites and divisions with unfilled positions.

Given these challenges, cross-training should be a district priority. Without it, divisions may struggle to perform critical functions such as position control monitoring, particularly in the event of absences or resignations. Insufficient training can also lead to uneven workload distribution, slowing essential processes and delaying key functions like hiring. Ensuring that staff are trained in both certificated and classified personnel functions would improve flexibility, responsiveness, and overall operational effectiveness across divisions.

A comprehensive cross-training program would not only enhance operational efficiency but also strengthen workplace morale by fostering teamwork, mutual support, and a deeper understanding of the unique responsibilities of each division. By promoting knowledge sharing and collaboration, the district can improve internal processes, increase staff capacity, and provide better service to employees and educational partners.

## Recommendations

*The district should:*

1. Ensure that personnel support services and personnel commission staff develop an annual in-person training plan for all staff.
2. Create a professional development calendar for business support services, personnel support services, technology services and personnel commission staff. This calendar should outline available training on essential district systems, such as Informed K12, Digital Schools and PeopleSoft.
3. Implement cross-training on district systems.
4. Identify backup personnel for key roles to prevent operational delays caused by staff unavailability.
5. Conduct follow-up-trainings for employees who are unable to attend scheduled trainings.
6. Develop and implement a cross-training schedule for personnel support services, business support services and personnel commission staff.
7. Develop a training program for newly hired personnel support services and personnel commission staff.

# Information Systems and Data Management

Information systems in school districts should support operational needs, streamline processes, and facilitate efficient data collection, sharing and retention. Integrated systems improve efficiency across divisions by ensuring data is entered once, stored securely, and shared seamlessly across platforms, minimizing redundancy and reducing the likelihood of errors. When systems are not integrated, staff must rely on manual processes to transfer information between divisions, increasing workload, delaying workflows, and leading to inconsistencies in data accuracy.

The lack of integrated information systems can have significant operational and financial consequences. FCMAT identifies “Nonintegrated information systems and data management” as one of the 20 indicators in its Indicators of Risk and Potential Insolvency tool. This indicator highlights critical issues such as non-integrated school district and county office financial systems, nonintegrated financial and human resource systems, and a lack of capacity to maintain accurate, consistent data across all platforms. School districts operating with nonintegrated systems face inefficiencies, data inconsistencies, and an increased risk of financial mismanagement.

These risks are evident in the district’s operations, where multiple standalone systems are used to manage business, payroll and human resource functions. Staff from the Business Support Services and Personnel Support Services divisions expressed concerns about the sheer number of systems, the complexity of processes, and the overall lack of integration. Additionally, some staff indicated that few employees fully understand the purpose or functionality of all the systems in use, making it difficult to navigate workflows and increasing the risk of errors.

The Business Support Services and Personnel Support Services divisions use the following information systems:

- **PeopleSoft:** The district’s primary business support services and personnel support services system. Employees use Peoplesoft to view paystubs and W-2’s, as well as update tax withholdings and direct deposit information.
- **Human Capital Management:** The district’s main position control repository but is not used for position control tracking.
- **Planning and Budget Cloud Service:** Used by the Business Support Services Division for budget development.
- **Frontline:** Used to manage employee absences, extra time and substitute management. Employees use Frontline to report absences, while substitutes use it to view and accept job assignments.
- **Digital Schools:** Used by the Payroll Department for absence and leave management, timesheets and extra work assignments. Sites also use it for position tracking and employees use it to view leave balances and record extra hours worked.
- **Informed K12:** Used by the Business Support Services Division to electronically track employee requisitions throughout the hiring process.
- **NeoGov:** Used by staff supporting the personnel commission function to manage classified job postings, recruitment and track the status of classified hiring.
- **EdJoin:** Used for posting certificated and management job openings.

Additionally, departments within the Business Support Services and Personnel Support Services divisions use specialized systems tailored to their needs. For example, the Transportation Department uses Bytecurve for scheduling and time reporting. Many departments also use ad hoc spreadsheets to track onboarding and manage various operational tasks. Interviews indicated that the management of staffing, substitutes and employee extra time varies across the district, depending on each division's preferences. While some departments use Digital Schools and PeopleSoft, others rely on different systems, standalone spreadsheets, or even paper records, further contributing to inconsistencies and inefficiencies.

The district's reliance on numerous information systems stems from a decentralized approach in which divisions and departments independently select and implement systems to meet their specific needs. These systems typically serve a single purpose or division and are often adopted without consulting other departments or considering their broader impact on district operations. As a result, the district operates multiple nonintegrated systems, leading to data inconsistencies, inefficiencies, and increased administrative burden.

Although concerns have been raised about the complexity and limitations of the district's information systems, changes have not been made because they continue to serve their original purpose. However, this fragmented approach has created oversight gaps and workflow inefficiencies. For example, Digital Schools lacks an approval process, increasing the risk of errors; allows charges to be assigned to incorrect budgets; and is initiated at the district level rather than the site, reducing local control and accountability.

Because many of the district's information systems are not integrated, data exchange often depends on intermediary spreadsheets or redundant manual entry. Digital Schools, for example, does not integrate with other district systems. Interviews indicated that while data is pulled nightly from PeopleSoft into Digital Schools, it cannot be pushed back into Peoplesoft. As a result, the Payroll Department must manually reconcile Digital Schools and Peoplesoft each month using spreadsheets. Similarly, sites must manually reconcile and enter data from Frontline into Digital Schools to process substitute pay. Additionally, business support services staff must reconcile data between Planning and Budget Cloud Service and Digital Schools during budget development and interim reporting periods.

These inefficiencies highlight the district's underuse of PeopleSoft. The system includes personnel action form processing, leave tracking, position control, and integration with other systems — features that could improve automation and reduce reliance on external information systems. Instead, the district has purchased additional systems to track this information, increasing costs and duplicating efforts. To improve efficiency and data accuracy, the district should collaborate with the San Diego County Office of Education to explore all available PeopleSoft modules. Reducing reliance on external systems could generate cost savings, eliminate redundant processes, and improve overall system integration.

To address these challenges, the district must conduct a comprehensive review of all information systems, including staff-developed ad hoc tools, to evaluate their necessity and effectiveness. Additionally, before implementing new systems, the district must ensure that all departments have an opportunity to assess potential impacts and provide feedback during the decision-making process.

## Recommendations

*The district should:*

1. Conduct a comprehensive review of all information systems, including staff-developed ad hoc tools, to evaluate their necessity and effectiveness.
2. Ensure each department has the opportunity to assess the potential impact of new system implementations and provide feedback or input during the decision-making process.

3. Research and consult with the county office and other school districts to identify opportunities to streamline and integrate processes and systems. If full integration is not feasible, implement intermediary solutions (i.e., spreadsheets, processes) where possible and provide training to minimize manual entry errors and inefficiencies.
4. Consider investing in a select number of systems that best serve districtwide and divisional needs, reducing reliance on standalone or redundant tools.

# Position Requisition Workflow and Approval

This subsection presents FCMAT's findings and recommendations on the district's position requisition workflow and approval processes. It examines the coordination between the Business Support Services and Personnel Support Services divisions and the efficiency of the district's position control system.

## Position Control

Position control is a system for tracking positions within a school district based on the number of approved roles assigned unique identifiers. This process involves creating, maintaining, and monitoring positions and their associated budgets to ensure that staffing decisions align with the school district's financial resources. Position control serves as the primary method for managing all positions, regardless of whether they are currently filled. When properly implemented, the system prevents unauthorized hiring, ensures employees are assigned only to approved roles, and helps mitigate budget shortfalls.

A well-managed position control system organizes positions by site or division and helps prevent over- or underbudgeting by accounting for all district-approved positions. It also ensures that routine annual expenses associated with staffing — such as step-and-column salary increases, substitutes, extra duty pay, stipends, vacation payouts, retiree health and welfare payments, and other contract-related costs — are accurately reflected in the budget.

Salaries and benefits represent the largest portion of a school district's budget, averaging approximately 86% of unrestricted general fund expenditures in California school districts.<sup>5</sup> According to the district's 2024-25 proposed budget, this figure is even higher at 90%. Given the significance of these expenditures, accurate position control data is essential for projecting costs, modeling adjustments to salary schedules, and maintaining a sustainable balance between staffing and financial resources.

To ensure accuracy, position control should be directly integrated with the school district's financial system so that personnel costs are properly reflected in the budget. The Personnel Support Services Division should use reports generated from the position control system, within the financial system, to monitor recruitment efforts, assess funding availability, and track vacancies and associated cost savings. Each position should have a unique position number assigned within the financial system. Further, any modifications to a position should be initiated using a standardized position request form in the financial system.

In well-functioning school districts, the Personnel Support Services and Business Support Services divisions share responsibility for maintaining an accurate position control system. Through ongoing collaboration, they ensure that staffing decisions align with the district's budget and priorities. School, department, and division leaders also play a key role in adhering to position control policies and procedures, ensuring that hiring and budget allocations follow established guidelines.

However, this level of coordination is lacking in the district. Beyond completing the district's position requisition form, collaboration between the Personnel Support Services and Business Support Services divisions is minimal. As discussed earlier in this report, these divisions do not hold regular, structured meetings. Instead, their interactions are often reactive, occurring only when issues arise rather than proactively ensuring alignment between position control and the district's budget.

<sup>5</sup>Ed-Data. (2023). General fund expenditures by object code, 2022-23. Available at [https://www.ed-data.org/state/CA/ps\\_MTE3MDA5](https://www.ed-data.org/state/CA/ps_MTE3MDA5).

## Position Control and Risk Management

FCMAT's Fiscal Health Risk Analysis (FHRA) tool is designed to help school districts evaluate their fiscal health and assess the risk of insolvency in the current and two subsequent years. The FHRA consists of 20 sections, each containing key questions aligned with the common indicators of fiscal distress. These indicators have been identified in school districts that neared fiscal insolvency and required assistance from outside agencies.

To strengthen its financial oversight, the district would benefit from using "Section 19 - Position Control" of the FHRA. This section helps school districts assess their position control processes, including staffing analysis, budget reconciliation, and governance oversight of new positions and costs. The questions in this section include the following:

- Does the district account for all positions and costs?
- Does the district analyze and adjust staffing based on staffing ratios and enrollment?
- Does the district reconcile budget, payroll and position control regularly, at least at budget adoption and interim reporting periods?
- Does the district identify a budget source for each new position before the position is authorized by the governing board?
- Does the governing board approve all new positions and extra assignments (e.g., stipends) before positions are posted?
- 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 school district cannot answer "Yes" to all these questions, its position control process may have deficiencies that increase the risk of financial mismanagement, inaccurate budgeting, and uncontrolled staffing costs. As of this report, the district could not answer "Yes" to all these questions, which could lead to inconsistencies in the budget and potential financial instability.

This gap highlights the district's need for stronger internal controls within the position control system to mitigate financial risks, maintain data accuracy, and ensure compliance with legal and regulatory requirements. Internal controls encompass policies, procedures, and oversight mechanisms designed to safeguard school district resources, maintain data accuracy, and prevent errors or fraud. Key components of these controls include checks and balances, regular reconciliations, and authorization protocols that promote fiscal integrity and accountability. When properly implemented, internal controls improve operational efficiency, support informed decision-making, and ensure that staffing and budget allocations align with district priorities.

A fundamental internal control principle is the separation of duties, which is critical for maintaining proper position control. Dividing position control responsibilities across the Business Support Services and Personnel Support Services divisions ensures that only board-authorized positions are entered into the system, that the Personnel Support Services Division hires exclusively for approved positions, and that payroll processes payments only for employees in authorized positions. However, the district lacks formal processes and procedures for coordinating position control between these divisions. To strengthen oversight and address this issue, the district should follow the recommended distribution of responsibilities outlined in Table 1 on the following page. This table delineates the roles of the governing board, Business Support Services, and Personnel Support Services divisions.



**Table 1. Suggested Distribution of Position Control Tasks**

| Responsible Party  | Task   |
|--|--|
| Governing Board  | Approve or authorize positions.  |
| Business Support Services Division                               | Enter approved positions into position control with estimated salary and budget.<br>Assign a unique position number.<br>Eliminate positions as necessary.<br>Manage account codes.<br>Develop and manage the budget.<br>Prepare budget, salary and multiyear projections.            |
| Personnel Support Services Division                              | Enter employee demographic data into the system, including: <ul style="list-style-type: none"> <li>• Name.</li> <li>• Address.</li> <li>• Social Security number.</li> <li>• Credential (if applicable).</li> <li>• Classification.</li> <li>• Salary schedule placement.</li> </ul> |
| Business Support Services & Personnel Support Services divisions | Update employee benefits.<br>Review and update employee work calendars.<br>Annually review and update salary schedules (or more frequently as needed, e.g., after collective bargaining).<br>Conduct annual reviews of employee assignments.   |

## P-43 Form Process

During interviews, it became evident that staff lacked a clear understanding of position control and its importance. Many mistakenly believed that the district's position requisition form, known as the P-43 form, served as the district's "position control system." While this form captures relevant position control information, its primary function is to initiate recruitment for both certificated and classified staff. Figure 1 on the following two pages provides a sample of the P-43 form.

## Sample P-43 Form

Informed K12

Mandatory Steps

Optional Steps

## Personnel Requisition (P-43)

**Step 1:** (Administrative Assistant or Administrator)

Initiator (Administrative Assistant or Administrator)

**Step 2:** (Principal or Director)Site/Department Administrator (*Supervising Administrator for review & approval*)**Step 3:** (Executive Director or Director)Categorical Approval\* (*LSS Department - Categorical Approval*)**\*Only** send if the form needs categorical approval. Otherwise, send to step 4:**Step 4:** (HR Technician)HR Technician (*HR Technician for approval*) will have the question: is this GF New position?

Yes - Step 6

No - Step 7

**Step 5 INACTIVE STEP***Delete (Positions Approval will be removed)***Step 6:** (Associate Supt. of BSS)Associate Supt. of BSS of Approval\* (*Approval if new position or increase in FTE GF*)**Step 7**Budget Approval (*Finance for budget review & approval*)

Adam - Categorical (Senior Accountant)

Laura - ESS (Accountant II)

Eva - F&amp;N (Accountant II)

Saeed - Sped (Budget Analyst)

Ilona - Unrestricted (Position Control Analyst)

Tracy - ASB (Accountant I)

**Step 8:** (Position Control Analyst)Positions Approval (*Position Control Analyst for approval*)**Add question: "Is this a funding change or inactivation? Yes/No****Yes - Goes to step 11 (skip DBT & Payroll)****No - Goes to step 9 - DBT****Step 9:**Budget - DBT (**Finance for budget DBT review for new positions and vacancies & approval**)

Eva - Other Funds (Accountant II)

Olga - Unrestricted (Budget Technician)

Vaness - Restricted and Sped (Budget Technician)

**Step 10:** (Lead Payroll Technician)

Payroll (New positions only for Digital Schools)

**Step 11:** (Associate Supt. of PSS)Associate Supt. of PSS (*Associate Supt. of PSS for approval*)

**Step 12:** (HR Technician)

PSS (*PSS for approval*)

**Update**

**Funding change or inactivation Goes to step 13**

**Classified** Goes to Step 14

**Certificated - transfer eligible position** Goes to Step 16

**Certificated - not transfer eligible** Goes to Step 17

**Funding Change or inactivation** Goes to Step 13

▼ **Step 13**

**DBT Team similar to step 9 Funding Change Approval (Finance DBT for approval)**

Eva – Other Funds (Accountant II)

Olga – Unrestricted (Budget Technician)

Vaness – Restricted and Sped (Budget Technician)

**Step 14:** (HR Assistant)

PC (*PC for approval*)

**Step 15:** (HR Technician)

PSS (*HR Technician for approval*)

**Step 16:** (HR Technician)

Transfer Eligible Approval (*HR Technician for approval*)

**Step 17:** (HR Technician or Administrative Assistant)

PSS (Certificated Process) (*PSS Admin for approval 6*)

Figure 1. A sample of the district's P-43 form showing the 17 total mandatory and optional steps in the district's process to initiate recruitment.

With up to 17 steps and an average completion time of 125 days, the P-43 process is cumbersome and inefficient. Staff expressed significant frustration, citing confusion and a lack of clarity regarding the process. Interviews revealed that many employees were only familiar with their specific step in the workflow and had little to no understanding of the overall process. This lack of awareness has contributed to inefficiencies and inconsistencies across divisions.

In 2023, the Business Support Services Division implemented Informed K12 to replace a paper-based P-43 workflow that had been in place for over a decade. Previously, staff had to physically move between divisions to track the status of paper forms, and interviews indicated that initiating recruitment could take anywhere from six weeks to several months. The transition to Informed K12 and an electronic P-43 workflow was intended to streamline hiring, improve transparency, and enhance accountability by ensuring all required steps were completed and providing real-time visibility into hiring statuses. However, despite these intended benefits, the system remains cumbersome. Interviewees reported that while Informed K12 increases visibility into employee requisitions, inefficiencies persist, with some staff even stating that the previous paper-based process was more effective.

Despite efforts to improve the P-43 workflow, no division has taken responsibility for managing the process or addressing delays, revealing deeper issues in coordination and collaboration. Errors are often met with finger-pointing among the Personnel Support Services and Business Support Services divisions, as well as staff supporting the personnel commission function, rather than resolved collaboratively. This breakdown stems from an inefficient workflow, inadequate training, and a lack of communication and trust. As a result, the process disrupts operations, reduces efficiency, and damages the reputation of these critical divisions across the district.

The district would benefit from streamlining the P-43 process by reducing the number of steps involved. Of the 17 steps, the Personnel Support Services Division (including personnel commission staff) is responsible for seven, while the Business Support Services Division handles six. Consolidating each division's responsibilities into a single step would reduce the process to a total of six steps.

Implementing these improvements will require consistent communication and coordination between the Business Support Services and Personnel Support Services divisions. Regular meetings with a structured agenda outlining positions to be funded, frozen, or eliminated will help establish accountability and improve the efficiency of the P-43 process.

## **Position Control Data and System Integration**

To fully address inefficiencies in the P-43 process, the district must also resolve inconsistencies in how position control data is managed across divisions. The lack of a dedicated position control system has led divisions to develop their own tracking methods for requisitions, resulting in fragmented and inconsistent data management. Some divisions rely on the position number, others use the Informed K12 form number, and some reference the requisition number generated within the P-43 form. Best practice is to track all requisitions using the position control number from the school district's financial system to ensure consistency.

In addition to varied requisition tracking methods, divisions have also created independent position control tracking systems, including spreadsheets, school site notes, Digital School reports, board meeting records, and budget reports. However, these systems do not align with PeopleSoft, the district's financial system, leading to discrepancies between division-reported data and official financial records. For example, the Personnel Support Services Division creates a certificated position management matrix to track FTE positions at each site. However, site administrators reported that the data in this matrix does not align with vacancy records in PeopleSoft or their own knowledge of site staffing. These inconsistencies indicate a breakdown in position control between PeopleSoft, personnel support services data, and site-level records.

Such misalignment increases the risk of budget errors, inaccurate reporting, and flawed decision-making. While core position control operations are verified with most sites and divisions, auxiliary funding for positions is not reviewed annually or at interim reporting periods, further compounding potential inaccuracies. To improve data accuracy, ensure consistency, and eliminate redundant data entry, divisions should discontinue the use of these independent position control tracking systems and consolidate all tracking within PeopleSoft.

The district previously attempted to implement Digital Schools for position control, but staff reported it was unsuccessful. Even if it had succeeded, Digital Schools would still lack direct integration with PeopleSoft. Although PeopleSoft includes a position control module, the district has not activated it. Because PeopleSoft already serves as the district's financial system, implementing this module would centralize and standardize position control management.

To determine the best approach for implementation, the district should collaborate with the San Diego County Office of Education, which supports PeopleSoft Finance<sup>6</sup> and hosts a customer advisory board to discuss its capabilities. However, per interviews, the district does not participate in these discussions. Interviews also indicated that San Diego Unified School District, which serves approximately 114,000 students per DataQuest, successfully implemented the PeopleSoft position control module with the support of the county office. Given this precedent, the district should also be able to implement PeopleSoft's position control module effectively.

Integrating position control within PeopleSoft would improve financial reporting, streamline operations, and create a more efficient and transparent system for managing district staffing. A centralized approach would provide real-time visibility into vacancies, filled positions, and budgeted allocations, enabling district leadership to make more informed staffing decisions. It would also ensure that financial data is accurate and consistent across all divisions. Because PeopleSoft is the source of all information submitted to the county office and the state, maintaining its accuracy is essential for financial oversight and compliance.

## Recommendations

*The district should:*

1. Ensure all relevant staff understand the full P-43 position control requisition process.
2. Redesign the P-43 position control workflow to reduce the number of approval steps from 17 to 6.
3. Schedule regular meetings between personnel support services (including staff who support the personnel commission function) and business support services and payroll to improve coordination on position control.
4. Ensure the P-43 form is tracked using the position control number in PeopleSoft, the district's financial system.
5. Discontinue the use of external position control tracking systems, such as spreadsheets.
6. Ensure all divisions use Peoplesoft for their position control data.
7. Explore replacing the P-43 form with the position control module within PeopleSoft.
8. Use section 19, "Position Control," of FCMAT's FHRA tool to assess whether best practices are being followed.

<sup>6</sup>San Diego County Office of Education. (n.d.). *PeopleSoft support*. Retrieved February 18, 2025, from <https://www.sdcoe.net/peoplesoft-support>.

# Recruitment and Hiring Processes

This subsection presents FCMAT's findings and recommendations on the district's recruitment and hiring processes. It examines the operational procedures within the Business Support Services and Personnel Support Services divisions, with a focus on efficiency, communication and employee support.

## Centralized Recruitment

The best practice for school districts is to centralize recruitment processes within their Personnel Support Services divisions. Personnel support services staff have specialized expertise in recruitment strategies and employment law, enabling them to facilitate an effective, legally compliant hiring process. A centralized approach ensures consistency, efficiency, and adherence to hiring procedures while fostering close collaboration with divisions seeking to fill vacancies.

By streamlining job postings, applicant screening, and initial processing, centralized recruitment reduces redundancy and delays. Standardized procedures aligned with board policies, legal requirements, and ethical standards help create a fair and transparent hiring process while minimizing the risk of biased or discriminatory hiring decisions. Additionally, a centralized approach enhances communication, ensuring that all education partners remain informed and engaged throughout the hiring process.

A centralized recruitment process also improves the candidate experience by maintaining consistency in expectations, communication, and selection procedures across all divisions. It not only promotes equity and compliance but also strengthens operational effectiveness, ensuring that hiring processes are fair, transparent, and aligned with the school district's long-term staffing goals.

However, the district uses a decentralized recruitment model, in which site or division administrators independently assemble interview panels and oversee hiring. This approach increases the risk of inconsistencies in hiring practices, leading to potential disparities that could result in discrimination claims and reputational harm. Additionally, decentralized recruitment creates communication gaps and inconsistencies in documentation, making it difficult to justify hiring decisions in the event of disputes.

Moreover, inadequate training for administrators increases the risk of noncompliance with board policies, employment laws, and regulations, which could result in fines, lawsuits, or other legal consequences. Establishing a centralized recruitment process under the Personnel Support Services Division would mitigate these risks, improve compliance, and create a more equitable, efficient, and legally sound hiring process.

## District New Hire Process

As detailed in the "P-43 Form Process" subsection earlier in this report, the district's requisition form (P-43 form) requires up to 17 approvals to initiate recruitment, depending on the position and funding source. The process begins with the division that has the vacancy and then moves to the principal or division manager for approval. Depending on the position or funding source, it may then require additional approvals from an executive director or categorical approval from learning support services. From there, the form routes through personnel support services, business support services, the district's sole position control analyst, back to business support services, then to the associate superintendent of personnel support services, and back to personnel support services. Finally, it is forwarded to either personnel commission staff for classified positions or to a human resources technician for certificated and other nonclassified positions to initiate recruitment.

If a P-43 form contains an error, such as an incorrect account string, it is sent back to the originator for correction, requiring the entire approval process to restart. Some personnel support services staff indicated in interviews that they occasionally assist in correcting errors to prevent delays, but this practice is inconsistent across all staff involved in processing the P-43 form. If an approver is absent or on vacation, the process stalls. The district provided FCMAT with recent P-43 form samples. A review of 10 classified and 10 certificated electronic P-43 forms originating between July and October 2024 showed that, on average, routing took 125 days — approximately four months — before recruitment could begin. Only after completing all approval steps is the hiring process officially initiated.

Interviews revealed that the district's ongoing struggles with recruitment and hiring inefficiencies have led to widespread frustration among site staff and divisions, contributing to a toxic work environment. Rather than collaborating to address the bottleneck caused by the P-43 process, divisions place blame on one another for the backlog and workload. A lack of communication both within and between divisions has further exacerbated the issue, leaving staff feeling isolated and unsupported. Additionally, interviewees reported that inquiries to business support services and personnel support services regarding the P-43 form or recruitment process often go unanswered.

Due to these communication breakdowns, sites and hiring managers have resorted to workarounds that fail to resolve the underlying issues, instead creating further delays and frustrations. While the district's decision to decentralize the recruitment process from Personnel Support Services to individual schools and divisions was intended to improve efficiency, it has instead introduced new challenges. These ongoing difficulties underscore the need for Personnel Support Services Division to maintain oversight of the recruitment process to ensure consistency, accountability, and timely hiring.

Frustration with the P-43 workflow stems from both a lack of understanding of the system and the perception that the system prioritizes "process over outcomes." Staff concerns include:

- **Internal transfers:** Classified employees seeking a transfer or reassignment to the same position at a different site must submit a full application and undergo the entire hiring process as if they were a new hire.
- **Vacancy timing restrictions:** Recruitment for vacancies cannot begin until a position is officially vacant. This means that known retirements or resignations cannot be addressed in advance, leading to unnecessary delays in filling positions.
- **Approval bottlenecks:** Because requisition statuses are visible throughout the process, delays are immediately apparent, adding to staff frustration — particularly since hiring cannot begin until a position is officially vacant. Interviews revealed that certain approval steps depend on a single individual. If that person is unavailable due to workload, vacation, or other reasons, the requisition stalls, further prolonging the hiring process.

To eliminate delays in recruitment, the district should streamline the P-43 approval process, improve communication between divisions, and implement cross-training to ensure staff can process approvals in the absence of key personnel.

## Classified Recruitment

Established in May 1969, the district's personnel commission oversees aspects of classified employment, including application review, examinations, eligibility lists, recruitment, appointments, promotions, demotions, and classification and reclassification of positions. Recruitment for classified positions begins once the personnel commission receives a completed and approved P-43 form.



The first step in the recruitment process is to review the eligibility list, which contains candidates who have completed the district's examination process and are deemed qualified for the position. According to the district's eligibility "Frequently Asked Questions (FAQ)" document, the personnel commission sends the hiring manager (a site or division administrator) the top three candidates from the eligibility list. The administrator then logs into NeoGov, the district's online platform for classified applications, navigates through three steps to locate the requisition, and begins contacting the candidates for interviews. Once a candidate is selected, the administrator returns to NeoGov to request an official offer of employment. The personnel commission then extends the formal offer.

If no eligibility list exists for the position, personnel commission staff must first develop or update the applicable exam before recruitment can begin. The position is then posted on NeoGov for 10–15 days. Once the recruitment period closes, the personnel commission specialist screens applications to determine if candidates meet the required qualifications. Applicants who meet the criteria are notified of their advancement in the hiring process, while those who do not are informed that they will not proceed further. Personnel commission staff then administer and score the required exam. Candidates who does not pass the required exam are prohibited from retesting for 90 days per Personnel Commission rule 40.200.4. Once the exam is completed, an eligibility list is created, and the process is followed as described above.

Site or division administrators are then responsible for organizing and conducting interviews, including developing interview questions, forming panels, scheduling candidates, and overseeing the selection process. Site administrators reported several issues caused by this approach:

- **Stale eligibility lists:** When hiring managers log into NeoGov to review candidates, the eligibility list is not updated in a timely manner, causing staff to contact outdated candidates. Many candidates have already secured other positions or moved on due to the lengthy hiring process, further delaying recruitment.
- **Duplicate efforts and competition among sites:** To compensate for inefficiencies in the district's hiring process, site administrators have resorted to tracking vacancies in a shared spreadsheet — an extra administrative step that complicates the process. Additionally, multiple sites may have vacancies for the same classified position, such as instructional aides. Because all sites access the same eligibility list in NeoGov, administrators often contact the same candidates, inadvertently creating competition between sites.
- **Delayed recruitment due to vacancy timing restrictions:** Because administrators cannot submit a P-43 form for recruitment until after an employee's official separation date, they are unable to hire in advance, preventing any overlap for cross-training and transition planning.
- **Administrative burden on site and division leaders:** In addition to hiring responsibilities, administrators must also manage their primary duties, such as responding to student emergencies, conducting staff observations, and meeting with parents. These competing priorities further slow the hiring process and contribute to delays.
- **Lack of clear communication with candidates:** Several candidates only learned their assigned site and work hours after receiving a job offer. Many declined upon discovering these details, forcing the district to restart the recruitment process from the eligibility list stage. This lack of upfront communication further delays hiring and undermines confidence in personnel support services and personnel commission staff's ability to facilitate an efficient hiring process. The district needs to ensure work hours, FTE, location, and start and end times are posted on all flyers and communicated to all candidates.

The district's recruitment model presents significant barriers to efficiency, communication, and timely hiring. The decentralized approach places an administrative burden on site and division leaders, creates unnecessary competition for candidates, and results in delayed recruitment due to rigid procedural requirements. Addressing these challenges requires improved coordination between personnel support services and personnel commission staff, enhanced communication with hiring managers and candidates, and the implementation of proactive recruitment strategies that prevent recurring delays and inefficiencies.

## Certificated Recruitment

To initiate the hiring process for a certificated vacancy, the site administrator creates an electronic P-43 form through Informed K12. At step 12 of the approval process, the position is reviewed to determine whether it must be posted internally for 10 calendar days, as required by the Poway Federation of Teachers collective bargaining agreement. If the position is filled internally, the process restarts. If the position does not require posting or is not filled, the form advances to step 17, at which point a personnel support services technician notifies the site or division administrator that they may log into EdJoin to review approved candidates and begin the interview process.

Once a candidate is selected, the site or division administrator is responsible for completing an interview packet. This includes assembling an interview panel (consisting of an administrator, certificated and/or classified employee representatives, parents and community members), developing interview questions, and conducting two to three reference checks before finalizing the hiring decision.

Site administrators reported that candidate lists provided for interviews have sometimes included ineligible applicants. In one instance, a candidate was offered employment, only for administrators to later discover that the individual did not possess a valid teaching credential. This oversight required the entire recruitment process to restart, further delaying hiring. Additionally, administrators noted that critical hiring periods in the summer were impacted by key personnel being on vacation, resulting in P-43 forms being stalled for weeks. These delays left sites with unfilled positions at the start of the school year.

Accurate enrollment projections are critical to determining staffing needs at each site. Beginning in late March and early April, learning support services, business support services, and personnel support services staff collaborate to project enrollment for the upcoming school year. This process helps identify vacancies due to attrition and determine whether additional staff will be needed at sites with growing student populations. However, the timing of the district's enrollment projection process occurs after the statutory March 15 deadline for releasing certificated staff, preventing the district from making timely staffing adjustments. This could lead to overstaffing at some sites and place a fiscal strain on district resources.

## Recommendations

*The district should:*

1. Centralize the recruitment process under the Personnel Support Services Division.
2. Ensure all recruitment flyers clearly shows key job details, including work hours, FTE, location, and start and end times.
3. Proactively monitor eligibility lists to ensure they remain current and valid when provided to hiring managers.
4. Ensure personnel support services staff accurately screen teacher candidates to confirm they hold the appropriate credential(s) required for their assignments.

# Workforce Integration and Transition: Onboarding, Support, and Offboarding

This subsection presents FCMAT's findings and recommendations on the district's processes for onboarding, employee support, and offboarding. It examines the structures in place for integrating new employees, the availability and effectiveness of support resources, and the district's approach to managing staff departures.

## Onboarding

New employee onboarding is the process of integrating staff into the school district and providing the necessary resources for a smooth transition into their roles. This includes accurately entering employee information into the school district's personnel and financial systems and completing all required federal, state, and local hiring paperwork before employment begins.

For onboarding to be effective, it must be coordinated across multiple divisions, including personnel support services, business support services, and information technology. This collaboration ensures that all required documents are collected, forms are completed on time, and new hires receive clear guidance on next steps. A well-structured onboarding process not only verifies employee qualifications and ensures compliance with hiring requirements but also familiarizes new staff with the school district's culture and values.

Meticulous attention to detail in the onboarding process enhances the new hire experience and sets the foundation for long-term success within the school district. To maintain accurate employment records, personnel support services must document the following onboarding milestones:

- Job offer extended.
- References cleared.
- Background cleared.
- Onboarding date confirmed.
- Cleared to start.
- Start date notification issued.

While certain aspects of onboarding can be completed virtually, some activities are most effective when conducted in person. These include explaining health benefits, introducing the district's organizational structure and key contacts, and outlining available resources. Face-to-face meetings also provide opportunities for employees to ask questions, receive immediate clarification, and build connections with district staff.

In-person onboarding offers several advantages, including fostering stronger relationships between new employees, colleagues and managers. It also allows for real-time feedback — both verbal and nonverbal — helping employees gain a clearer understanding of expectations, job responsibilities and workplace culture.

The district should establish consistent annual onboarding dates aligned with peak hiring periods to streamline the process. It is common for personnel support services to take an all-hands-on-deck approach six to eight weeks before the school year begins, ensuring new staff are onboarded and ready to start on time.

The district's onboarding process begins when a candidate is selected and recommended for hire, regardless of classification or position. The recommendation process varies depending on employee type and position. As a merit district, the personnel commission holds the authority for classified positions and must approve all classified staff hires. Once personnel support services — which includes the Human Resources and Personnel Commission divisions — receives the recommendation for hire, the onboarding process begins.

The district's onboarding process ensures that all necessary employee information and documentation are collected. To accommodate the various positions and staff, the district maintains multiple onboarding checklists. These checklists specify what information must be collected, who is responsible for collecting it, and when it should be obtained:

- **Certificated Employees:** The Personnel Support Services Division follows a checklist for onboarding certificated employees. This document outlines key procedures, including collecting required personnel file information, verifying employment eligibility and salary placement through a technician and the human resources director, creating a “hiring checklist” to confirm background clearances and credentials, and administering employment contracts. While not explicitly listed on the checklist, certificated positions are presented to the governing board for approval.
- **Classified Employees:** The Personnel Support Services Division also follows a checklist for onboarding classified employees. This ensures that personnel files are completed, employment and payroll documents are received and reviewed, start dates are communicated to employees, and employment is submitted to the governing board for ratification.
- **Other Employees and Service Providers:** The Personnel Support Services Division maintains comprehensive onboarding checklists for other employment categories and service providers, including special employment, substitutes and volunteers. These checklists help ensure that documentation, clearances and approval requirements are met. The district is encouraged to continue this structured approach to onboarding.

The district's onboarding process is conducted almost entirely electronically, with employment documents completed online.

## New Employee Support

A well-structured onboarding process is essential for integrating new employees into the district, ensuring they have the knowledge, resources, and support needed to succeed in their roles. However, the district does not provide a standardized in-person orientation or onboarding support for new hires. As a result, employees reported receiving little to no information about compensation, benefits or working conditions before their first day of work.

The district offers minimal onboarding resources beyond a resource guide for administrators and supervisors and a handbook for substitute teachers. Additionally, it does not provide job-specific training, leaving employees to navigate their roles independently. Staff also indicated they were unfamiliar with district-level processes and roles, making their transition into the organization more challenging.

Without a district-led in-person onboarding process, employee associations (union groups) often serve as the only source of face-to-face interaction for new hires, according to staff. Assembly Bill 119 (Chapter 21, Statutes of 2017) grants these associations access to meet with employees during onboarding, but this does not replace the need for a structured, district-led orientation that familiarizes employees with workplace expectations, policies and resources.

The only in-person onboarding event appears to be "New Teacher Day", as mentioned in the *Administrator/Supervisor Resource Guide 2024/25*. New teachers may be invited to attend this event by the Personnel Support Services Division, provided they have completed all required onboarding documents.

Beyond the lack of in-person orientation, new employees appear to be onboarded individually, without consideration for peak hiring periods, such as the start of the school year. This individualized approach is inefficient and may cause delays in processing new hires and filling vacancies. A cohort-based onboarding process — where new employees are onboarded in groups — would help streamline operations, reduce processing times, and support a more efficient use of staff time.

By not implementing a structured onboarding program, the district is missing an opportunity to provide a personalized welcome to new hires, integrate them into the organization, and provide essential training on district systems and processes. Without this support, employees may struggle to access district resources, feel disconnected from colleagues, and lack a sense of belonging. These challenges can negatively affect productivity, job satisfaction, and employee retention, potentially increasing turnover and recruitment costs.

## Resource Guides and Handbooks

Resource guides and handbooks are essential tools for school district employees, providing structured information on district policies, procedures, and expectations. They help employees navigate their roles more effectively by outlining key responsibilities, district processes, and available resources. These documents are particularly valuable for new hires, offering guidance that facilitates a smooth transition into the organization.

Additionally, resource guides and handbooks promote consistency across the school district by ensuring that employees have access to standardized information. When tailored to specific employee groups — such as management, certificated, or classified staff — these tools enhance understanding of job expectations, improve efficiency, and contribute to employee retention. Keeping these guides up to date ensures employees remain informed about evolving policies, operational changes, and best practices within the school district.

The district has developed the *Administrator/Supervisor Resource Guide 2024/25* to support employee success and integration into the organization. The guide aims to “provide school sites and divisions general information regarding common personnel matters.” It serves as a resource for district processes and systems, outlines the roles of the Personnel Support Services Division, provides key contact information, and addresses various staffing and employment-related topics that administrators may encounter. This guide is particularly valuable for newly hired administrators and supervisors.

The district has also developed the *Substitute Teacher Handbook of Personnel Policies and Guidelines 2024/25*, designed “to provide information that will help answer questions and pave the way to a successful year of substitute teaching.” This handbook includes general employment information such as credentialing requirements, retirement systems, and legal considerations, along with district-specific details on compensation, assignments, performance expectations and safety procedures. It also outlines district start and dismissal times, calendars and professional resources, including best practices for professional success, responsibilities, and classroom management strategies.

FCMAT encourages the district to post the resource guide for administrators and supervisors and the handbook for substitute teachers on its intranet and ensure they are regularly updated. The district has not developed resource guides for other employee groups. Expanding the use of these guides to support certificated and classified staff — including transportation, food services, and instructional aides — could provide valuable guidance in areas where the district faces challenges in attracting and retaining employees. Standardized resource guides for these groups would also improve onboarding, clarify job expectations, and enhance overall efficiency.

## Offboarding

Offboarding is the structured process of managing an employee's separation from a school district due to retirement or resignation. It involves completing paperwork for compensation and benefits, recovering district property, terminating system and facility access, collecting feedback, and facilitating knowledge transfer of processes, tools and resources to support a smooth transition for successors.

The district lacks a formalized offboarding process, creating risks such as incomplete separation procedures and loss of institutional knowledge. Interviews indicated that the district does not administer its exit survey consistently, leading to gaps in feedback and data that is not representative of all departing employees. Establishing a formal offboarding process would help ensure that all required documentation is completed, district assets are recovered, system access is revoked, and exit surveys are systematically administered to gather valuable insights.

## Recommendations

*The district should:*

1. Establish an in-person onboarding process and implement a cohort model during peak hiring periods.
2. Continue to maintain and regularly update comprehensive onboarding checklists to ensure all documentation and employment eligibility requirements are met before new hires begin work.
3. Continue to maintain the resource guide for administrators and supervisors and the handbook for substitute teachers.
4. Develop and maintain additional comprehensive resource manuals tailored to certificated and classified staff.
5. Disseminate the resource manuals to all employees electronically and post them on the intranet.
6. Implement a comprehensive offboarding checklist and process that ensures the collection of all necessary documentation and materials while encouraging employees to complete an exit survey.



# Personnel Commission

The personnel commission's stated mission, as outlined on its [web page](#), is to ensure a fair and consistent employment process for classified staff, with responsibilities that include recruitment and hiring. According to the district, the personnel commission function is housed within the Personnel Support Services Division. However, the 2024-25 personnel support services organizational chart does not show any direct connection to personnel commission staff.

Interviews indicated that personnel support services staff and other district divisions lack clarity on the commission's role, responsibilities, and authority. No training is provided on the merit system or the commission's functions outside of the employees who directly support the personnel commission. Additionally, the commission's role is not referenced in the administrator resource guide.

The exclusion of personnel commission staff from meetings within personnel support services and other district divisions further contributes to misunderstandings about the commission's role, responsibilities, and authority within the district. This isolation leaves personnel commission staff disconnected from district divisions, processes, communications, and key decision-making. As a result, when delays in the hiring process occur, personnel commission staff may be unfairly targeted despite broader systemic inefficiencies.

## Recommendations

*The district should:*

1. Revise the Personnel Support Services Division organizational chart to clearly reflect its connection to personnel commission staff.
2. Incorporate a description of the personnel commission's role, responsibilities and processes in the administrator resource guide.
3. Ensure the personnel commission's role is included in district trainings.



# Volunteer Clearance Process

Each LEA in California is required to develop and adopt a Local Control and Accountability Plan (LCAP) before the start of each fiscal year. The LCAP is a three-year plan that outlines the school district's goals, planned actions, and budget allocations to improve student outcomes. Each goal must align with the California Department of Education's [10 priorities](#), be specific to the school district, and include measurable outcomes. Additionally, the school district is responsible for reporting on the progress and outcomes of its adopted goals.

The district's LCAP outlines several goals related to volunteer engagement and community partnerships. Specifically, the fourth goal of the district's [LCAP](#) is to:

Engage Parents, Business, and Community Partners to foster shared responsibility and accountability in order to deliver personalized, rich, and rigorous learning experiences.

This goal aligns with the third goal of the LCAP, which aims to:

Foster and Maintain Positive Relationships with Parents and Community: Increase engagement of parents, business, and community partners to foster shared responsibility and accountability in order to deliver personalized, rich, and rigorous learning experiences.

The district reinforces this commitment in its [LCFF Budget Overview for Parents](#), stating, in part, that it supports the LCAP's third goal by:

Actively employ[ing] strategies and programs to build partnerships with our students' families. We pride ourselves in establishing welcoming school environments and positive school climates. Each of our sites encourage parents to be active partners in their child's education. **Parent volunteers can be seen on a regular basis at our sites supporting the school in a variety of ways. ...**

[Emphasis added by FCMAT.]

To support these commitments and provide a clear framework for volunteer involvement, the district has adopted formal policies and procedures. Board Policy 1240(c) and Administrative Regulation 1240(c), last updated in October 2017, outline the district's guidelines for volunteer participation. Additionally, the district maintains a dedicated [web page](#) detailing the volunteer process and requirements.

Interviews with school administrators and administrative staff indicate that the volunteer onboarding process is difficult and inefficient. Volunteers are required to reapply annually at each school where they wish to help. This has significantly increased the administrative workload, with staff reporting that by December, they were still processing applications submitted at the beginning of the school year. Further, the district only recently cleared its volunteer list, which had not been maintained for over a decade.

The lack of a districtwide clearance option creates additional barriers for parents and district employees who wish to volunteer. Parents with children attending multiple schools must complete and submit separate applications for each site, and existing district employees — classified, certificated, and management staff — who have already undergone background checks must reapply annually to serve as volunteers. This redundant process consumes valuable staff time and resources, creating inefficiencies for both applicants and administrative personnel.

Additionally, site administrators and staff lack clarity regarding the distinctions between a Visitor, Volunteer I, and Volunteer II. This confusion has led some site administrators to default all volunteers to the Volunteer II classification, unnecessarily increasing processing requirements and delays. To streamline the process,

the district should clearly define each classification and ensure this information is effectively communicated to site administrators, staff, parents, and the community.

Furthermore, the district is in the process of implementing a new electronic system streamline the processing of Visitors and Volunteer I applicants at schools, eliminating the need for processing at the district office. The August 15, 2024 board meeting agenda outlined the scope of this project:

This project aims to update the video intercom system and visitor management solution at 33 of its sites. The selected vendor will provide a turnkey visitor management system that includes a video intercom, indoor lobby camera, and cloud video storage. The awarded vendor is expected to furnish, install, configure, train, and support the selected system. This project will address safety concerns at school sites and add an additional level of security for staff and students, and will be funded with Site Safety Funds.

In August 2024, the board awarded a contract for this project to Vector Resources, Inc. However, interviews with site administrators and personnel support services staff indicated that they were unaware of this contract or the new system. FCMAT could not confirm whether any site administrators had been consulted during the request for proposal process or whether their input had been considered in the selection and implementation of this system.

According to interviews, the new system is expected to be fully implemented and functional by Spring of 2025. To ensure a smooth transition, the district should proactively communicate with site administrators and relevant staff involved in the volunteer onboarding process. Clear guidance on roles, responsibilities and expectations is essential for successful implementation. Without proper communication and training, the rollout of the new system may lead to delays, confusion, and frustration among staff and the community, ultimately undermining the district's goal of improving efficiency and security in volunteer processing. The district also needs to revisit Board Policy 1240(c) and Administrative Regulation 1240(c) to reflect these changes to the volunteer system.

## Recommendations

*The district should:*

1. Clearly define the differences between Visitor, Volunteer I and Volunteer II, and communicate this information to relevant education partners (e.g., schools and divisions).
2. Communicate the new visitor management contract and its impacts to relevant divisions.
3. Ensure staff receive adequate training on the new volunteer system.
4. Revisit its board policy and administrative regulation to ensure they reflect any changes to the volunteer system.
5. Keep its volunteer website current and aligned with the new electronic volunteer system.

## Related Customer Service

Given its central role in district operations, the Personnel Support Services Division must provide timely and effective support to schools and divisions. However, communication delays and inconsistent service have frustrated district employees who depend on the division for critical human resources functions. Many interviewees reported a lack of support, inconsistent follow-through, and slow response times, all of which have diminished service quality. Additionally, staff indicated that instead of collaboratively addressing challenges, the Personnel Support Services Division often shifts blame to personnel commission or business support services staff.

Common concerns raised in FCMAT interviews included delayed or incorrect information, unanswered emails and phone calls, inconsistent processes and procedures, and prolonged timelines — sometimes several weeks — to resolve identified errors. Some employees stated they had to physically visit the Personnel Support Services Division office to obtain support or answers to questions. However, rather than receiving proactive and solution-oriented assistance, they often encountered an adversarial or reactive approach. Many employees reported having to repeatedly follow up for responses, only to receive delayed or incomplete information. Others shared that when they did reach someone, they were frequently told, “That’s not my division,” forcing them to track down answers on their own.

Poor customer service can further erode employee trust in the Personnel Support Services Division, discouraging staff from seeking assistance when necessary. This lack of support directly affects essential functions such as hiring, payroll, and benefits administration, leading to operational bottlenecks and disruptions. Staff also noted that inadequate communication has contributed to declining morale across the district. Furthermore, prolonged response times in critical areas — including payroll disputes, employee grievances, and contract administration — can expose the district to legal risks and strained labor relations, further complicating operations. Inconsistent follow-through can lead to miscommunication, missed deadlines, and incomplete documentation, increasing the risk of compliance violations and financial liabilities.

To address these concerns, the governing board, superintendent, and associate superintendent of personnel support services must define “excellent customer service” and set an expectation that the Personnel Support Services Division upholds this standard. They should establish clear guidelines for timely and professional communication to ensure all employees receive consistent and reliable service. Implementing districtwide response timelines for emails and phone calls will help standardize service expectations and promote accountability. If a complete response will be delayed, staff should provide an initial acknowledgment with an estimated timeline for resolution. Establishing these expectations is critical because employees need assurance that their concerns are being heard and addressed in a timely manner.

Beyond improving response times, the district should establish formal feedback mechanisms to allow school and division staff to share their experiences and concerns. Regular feedback not only enhances service delivery but also promotes efficiency, strengthens collaboration, and fosters a shared understanding of the division’s role in supporting districtwide operations. One effective approach is to conduct an annual customer service satisfaction survey, which would provide valuable insights into service quality and responsiveness. Without structured feedback, district leadership lacks the necessary data to assess service gaps and implement meaningful improvements.

By improving communication, increasing accountability, and prioritizing responsiveness, the district can help restore confidence in the Personnel Support Services Division. Strengthening customer service will lead to better employee relationships, enhanced operational efficiency and foster a more supportive and service-oriented work environment districtwide.

## Recommendations

*The district should:*

1. Define “excellent customer service” and set an expectation that the Personnel Support Services Division upholds this standard.
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. Conduct a customer service survey to identify, address and support areas needing improvement.

# Appendices

**Appendix A — Study Agreement**

**Appendix B — Amended Study Agreement**

# Appendix A – Study Agreement

**FCMAT**FISCAL CRISIS & MANAGEMENT  
ASSISTANCE TEAM

## FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT FOR MANAGEMENT ASSISTANCE

This study agreement, hereinafter referred to as Agreement, is made and entered into by and between the Fiscal Crisis and Management Assistance Team, hereinafter referred to as the Team or FCMAT, and the Poway Unified School District, hereinafter referred to as the Client; collectively, FCMAT and Client are hereinafter referred to as the Parties. This Agreement shall become effective from the date of execution hereof by FCMAT.

### 1. BASIS OF AGREEMENT

FCMAT provides a variety of services to local education agencies (LEAs) as authorized by Education Code (EC) 42127.8(d). The Client has requested that the FCMAT assign professionals to study specific aspects of the Client's operations. The professionals will include FCMAT staff and may include professionals from county offices of education, school districts, charter schools, community colleges, other public agencies or private contractors. All professionals assigned shall work under the direction of FCMAT. All work shall be performed in accordance with the terms and conditions of this Agreement.

FCMAT will notify the Client's county superintendent of schools of this Agreement.

### 2. SCOPE OF THE WORK

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

1. Review operational processes and procedures in the Business Support Services (BSS), Personnel Support Services departments (PSS) (including Personnel Commission) and make recommendations for improved efficiency, if any, in the following areas:
  - New hires – internal and external (recruitment, hiring, onboarding, communication, entry in position control system, HR employee management system and payroll system, and other challenges identified during fieldwork).
  - Position requisition workflow and approval, including use of technology.
  - Volunteer clearance.
  - Related customer service.
2. The Team will present the final report to the district's BSS, PSS and Special Education departments at a meeting following the completion of the review.

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

1. Orientation Meeting  
The Team will conduct an orientation session at the Client's location to brief the Client's management and supervisory personnel on the Team's procedures and the purpose and schedule of the study. This orientation meeting is normally held at the

beginning of fieldwork for the study.

2. Fieldwork

The Team will conduct fieldwork at the Client’s office and/or school site(s), or other locations as needed. Limited fieldwork may also be conducted remotely via telephone or videoconferencing services, in addition to the Public Safety Considerations outlined in Section 13 below.

3. Exit Meeting

The Team will hold an exit meeting at the conclusion of the fieldwork to inform the Client of the status of the study. The exit meeting will include a review of the scope of work; outstanding items, including documents, data and interviews not yet received or held; and the estimated timeline for a draft report. The meeting will not memorialize details regarding findings because the Team’s conclusions may change after a complete analysis is finished. Exceptions to this will be findings of immediate health and safety concerns for students or staff, and other time-sensitive items that include the potential for risk or exposure to loss.

4. Exit Letter

Approximately 10 business days after the exit meeting, the Team will issue an exit letter briefly memorializing the topics discussed in the exit meeting.

5. Draft Report

An electronic copy of a preliminary draft report will be delivered to the Client’s point of contact identified below for review and comment.

6. Final Report

An electronic copy of the final report will be delivered to the Client’s point of contact and to the Client’s county superintendent of schools following completion of the study. FCMAT’s work products are public and all final reports are published on the FCMAT website.

7. Board Presentation

Presentations to the Client’s board are optional and are made at the request of the Client. If a board presentation is requested, it will be noted in the scope and objectives of the study or can be added as a change in scope at a later date.

8. Follow-Up Review

If requested by the Client within six to 12 months after completion of the study, FCMAT, at no additional cost, will assess the Client’s progress in implementing the recommendations included in the report. This follow-up support is primarily a document review-based study. Progress in implementing the recommendations will be documented to the Client in a FCMAT management letter. FCMAT will work with the Client 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 the date of the final report.

### 3. PROJECT PERSONNEL



The personnel assigned to the study will be led by a FCMAT staff person (job lead) and will include at least one other professional. FCMAT will notify the Client of the assigned personnel when the fully executed copy of this Agreement is returned to the Client.

FCMAT will communicate to the Client any changes in assigned project personnel.

#### **4. PROJECT COSTS**

The cost for studies requested pursuant to EC 42127.8(d)(1) and 84041 shall be as follows:

- A. \$1,100 per day for each FCMAT staff member while on site conducting fieldwork. The cost of independent FCMAT consultants will be billed at their daily rate for all work performed. On-site is defined as either 1) physically at the Client's office or school site(s), or 2) in a scheduled virtual meeting with the Client's personnel, representatives or others associated with the scope of work pursuant to Section 13 below.
- B. All out-of-pocket expenses, including travel and its associated costs, and miscellaneous items necessary to complete the scope and objectives of the study.
- C. The applicable indirect rate at the time work is performed on the study will be added to all costs billed.
- D. The Client will be invoiced for 50% of the not-to-exceed cost shown below following completion of fieldwork (progress payment) and the remaining amount shall be due upon the issuance of the final report or presentation to the Client's board, whichever is later (final payment). The Parties agree that changes documented in a revised study agreement may change the original not-to-exceed amount shown below. If changes are made before or during fieldwork, the new not-to-exceed amount documented in such a revised study agreement will constitute the basis for the progress payment. If changes are made after fieldwork, 100% of the total changed value documented in a revised study agreement, less progress payments made, will constitute the final payment due. All payments shall be due immediately based on the terms of the invoice.

**Based on the scope and objectives of the study, the total not-to-exceed cost of the study will be \$40,300.**

- E. Any change to the scope of work will affect the total cost. Changes may include, but are not limited to, delays, revisions to the scope of services, and substitution or addition of personnel. The need for changes shall be communicated by FCMAT to the Client in advance in the form of a revised study agreement.

Payments for FCMAT's services are payable to Kern County Superintendent of Schools, Administrative Agent, 1300 17th Street, City Centre, Bakersfield, CA 93301.

#### **5. RESPONSIBILITIES OF THE CLIENT**

- A. Return current organizational chart(s) that show the Client's management and staffing structure with the signed copy of this Agreement. Organizational charts should be

relevant to the scope of this Agreement.

- B. Provide private office or conference room space for the Team’s use during fieldwork.
- C. Provide for a Client employee to upload all requested documents and data to FCMAT’s online SharePoint repository per FCMAT’s instructions. Provide FCMAT with the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT with the signed copy of this Agreement.
- D. Provide documents and data requested on the Team’s initial and supplementary document request list(s) by the date requested.

All documents and data provided shall be responsive to FCMAT’s request, in quality condition, readable and in a usable form. With few exceptions, documents and data requested are public records and records maintained by LEAs in the routine course of doing business. Some data requested may require exporting LEA financial system reports to Microsoft Excel or another usable format agreed to by FCMAT.

All documents shall be provided to FCMAT in electronic format, labeled as instructed by FCMAT. Upon approval of this Agreement, access will be provided to FCMAT’s online SharePoint repository, to which the Client will upload all requested documents and data.

- E. Ensure appropriate senior-level staff are available for the orientation and exit meetings.
- F. Facilitate access to requested board members, officers and staff for interviews.
- G. Facilitate access to requested information and facilities to include, but not be limited to, files, sites, classrooms and operational areas for observation.
- H. Review a draft of the report and return it to FCMAT by the date FCMAT requests with any comments regarding the accuracy of the report’s data or the practicability of its recommendations. The Team will review this feedback in a timely manner and make any adjustments it deems necessary before issuing the final report.
- I. Return the requested evaluation survey to FCMAT as described below.

## **6. PROJECT SCHEDULE**

Time is of the essence. The Parties acknowledge that the goal of the scope and objectives of the study under this Agreement is to produce a timely and thorough report that adds value for the Client. To accomplish this goal, the Parties agree to communicate and mutually agree to honor established time commitments. These commitments include the Client providing requested documents, setting and keeping interview appointments and returning comments on the draft report consistent with the established project schedule.

The following project schedule milestones will be established by FCMAT upon receipt of a signed Agreement from the Client:

| <b>ACTION</b>                                     | <b>TIMELINE</b>   |
|---|---|
| FCMAT provides the Client with a draft Agreement. | Draft Agreements are usually provided within 20 business days of the Client’s |

| ACTION  | TIMELINE  |
|---|---|
|   | initial request for services.   |
| Client returns partially executed Agreement to FCMAT along with the applicable organizational chart and the name and email of the person who will be responsible for collecting and uploading documents requested by FCMAT. | Draft Agreements are valid for 30 business days.  |
| FCMAT returns a fully executed Agreement to the Client and identifies the project schedule and the lead and other personnel assigned to the job.  | Within five business days of the Client's return of the signed Agreement.   |
| Client uploads initial requested documents and data to FCMAT's online SharePoint repository.  | Within 10 business days of the Client's receipt of the FCMAT document and data request list.                                  |
| Fieldwork   | Mutually agreed upon; usually, to commence within 10 business days of FCMAT's receipt of requested documents and data.        |
| Orientation meeting   | First day of fieldwork.   |
| Exit meeting  | Last day of fieldwork.  |
| Follow up fieldwork, if needed (e.g., rescheduled interview, additional interviews).  | Mutually agreed upon; usually, within five business days of FCMAT's request.  |
| Client uploads supplemental documents and data to FCMAT's online SharePoint repository.   | Within two business days of the Client's receipt of FCMAT's supplemental document and data request(s).                        |
| Draft report submitted to the Client.   | To be determined, usually, within eight weeks of the conclusion of fieldwork and receipt of all documents and data requested. |
| Client comments on draft report   | Within 10 business days of FCMAT providing a draft report to the Client.  |

The Client acknowledges that project schedule deadlines build upon and are contingent on each previous deadline. Missed deadline dates will affect future deadline dates and ultimately the timing of the final report. For example, if the Client does not provide requested documents and data by the specified date, the fieldwork may not be able to proceed as originally planned.

FCMAT acknowledges that the Client has an educational program to administer, is balancing many priorities, and in some cases may have records management difficulties, staffing capacity issues, staff on various types of leave, or other circumstances, all of which will affect the project schedule.

The Parties commit to regular communication and updates about the study schedule and work progress. FCMAT may modify the usual timelines as needed.

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

FCMAT will commence work as soon as it has assembled an available and appropriate study team, taking into consideration other jobs FCMAT has previously undertaken, assignments from the state, and higher priority assignments due to fiscal distress. The Team will work expeditiously to complete its work and deliver its report, subject to the cooperation of the Client and any other related 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 report. In the absence of extraordinary circumstances, FCMAT will not withhold preparation, publication and distribution of a final report once fieldwork has been completed.

Prior to completion of fieldwork and upon written notice to FCMAT, the Client 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 Client does not provide written notice of termination prior to completion of fieldwork, the Team will complete its work and deliver its final report and the Client will be responsible for the full costs.

FCMAT may terminate this Agreement at any time if the Client fails to cooperate with the requested project schedule, provide requested documents and data and/or make staff available for interviews as requested by FCMAT.

## **8. INDEPENDENT CONTRACTOR**

FCMAT is an independent contractor and is not an employee or engaged in any manner with the Client. 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 Client in any manner without prior express written authorization from an officer of the Client.

## **9. RECORDS**

The Client understands and agrees that FCMAT is a state agency and all FCMAT reports are public records and are published on the [FCMAT website](#). Supporting documents and data in FCMAT's possession may also be public records and will be made available in accordance with the provisions of the California Public Records Act.

FCMAT has a records retention policy and practice, and every effort will be made to maintain records related to this Agreement in accordance with this policy.

## **10. CONTACT WITH PUPILS**

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

## **11. 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 Client, automobile liability

insurance in the amount required by California state law, and workers' compensation as required by California state law. Upon the request of the Client and receipt of the signed Agreement, FCMAT shall provide certificates of insurance, with the Client named as additional insured, indicating applicable insurance coverages.

## **12. HOLD HARMLESS**

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

## **13. PUBLIC SAFETY CONSIDERATIONS**

Whether due to public health considerations, extreme weather conditions, road closures, other travel restrictions or interruptions, shelter-at-home orders, LEA closures or other related considerations, at FCMAT's sole discretion, the Scope of Work, Project Costs, Responsibilities of the Client, and Project Schedule (Sections 2, 4, 5 and 6 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, or other means. References to fieldwork shall be interpreted appropriately given the circumstances.
- B. Activities performed remotely that are normally performed in the field shall be billed hourly as if performed in the field (excluding out-of-pocket costs that can otherwise be avoided).
- C. The Client may be relieved of its duty to provide conference and other work area facilities for the Team.

## **14. FORCE MAJEURE**

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

## **15. EVALUATION**

In the interest of continuous improvement, FCMAT will provide the Client with an evaluation survey at the conclusion of the services. FCMAT appreciates the Client's honest assessment of the Team's services and process. The Client shall return the evaluation survey within 10 business days of receipt.

## **16. CLIENT CONTACT PERSON**

The Client's contact person designated below shall be the primary contact person for



FCMAT to use in communicating with the Client on matters related to this Agreement. At any time when this Agreement or FCMAT's process requires that FCMAT send information, document request lists, draft report or final report, or when FCMAT makes other requests for the Client to act upon, this is the person whom FCMAT will contact. The Client may change the contact person upon written notice to FCMAT's job lead assigned to the study.

Name: Margaret Godman, Executive Assistant to the Superintendent

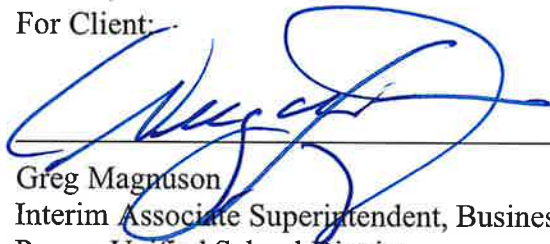
Telephone: (858) 521-2703

Email: [mgodman@powayusd.com](mailto:mgodman@powayusd.com)

## 17. SIGNATURES

Each individual executing this Agreement on behalf of a party hereto represents and warrants that he or she is duly authorized by all necessary and appropriate action to execute this Agreement on behalf of such party and does so with full legal authority.

For Client:



Greg Magnuson  
Interim Associate Superintendent, Business Support Services  
Poway Unified School District

10/21/24

Date

For FCMAT:

Michael H. Fine

Digitally signed by Michael H. Fine  
Date: 2024.10.22 09:31:31 -07'00'

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

Date

# Appendix B — Amended Study Agreement



## FISCAL CRISIS & MANAGEMENT ASSISTANCE TEAM STUDY AGREEMENT FOR MANAGEMENT ASSISTANCE AMENDMENT No. 1

This Amendment No. 1 to the Agreement, is made and entered into by and between the Fiscal Crisis and Management Assistance Team, hereinafter referred to as the Team or FCMAT, and the Poway USD, hereinafter referred to as the Client; collectively, FCMAT and Client are hereinafter referred to as the Parties. This Amendment No. 1 shall become effective from the date of execution hereof by FCMAT.

### RECITALS

- A. On October 22, 2024, FCMAT and Client entered into an Agreement for management assistance (Original Agreement).
- B. FCMAT and Client desire to amend the Agreement as provided herein.

### AGREEMENT

#### 1. ORIGINAL AGREEMENT

Except as herein modified, the Original Agreement between the parties shall remain in full force and effect.

#### 2. SCOPE AND OBJECTIVES OF THE STUDY

The scope and objectives of the study are amended to remove scope point 2. The Team will present the final report to the district's BSS, PSS and Special Education departments at a meeting following the completion of the review.

#### 3. PROJECT COSTS

Based on the revised scope and objectives of the study, the revised total not-to-exceed cost of the study will be reduced to \$37,000.

#### 4. SIGNATURES

Each individual executing this Amendment No. 1 on behalf of a party hereto represents and warrants that he or she is duly authorized by all necessary and appropriate action to execute this Amendment No. 1 on behalf of such party and does so with full legal authority.



For Client:



Dr. Ben Churchill

Superintendent

Poway Unified School District

3-31-25

Date

For FCMAT:

Michael H. Fine

Digitally signed by Michael H. Fine

Date: 2025.03.31 17:26:10 -07'00'

Michael H. Fine,

Chief Executive Officer

Fiscal Crisis and Management Assistance Team

Date