



OCEAN VIEW SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA

Thursday, December 11, 2014

REGULAR MEETING

4:30 p.m.

Board Room, Building A

Classified Employees

in PARTNERSHIP with EDUCATION

Personnel Commission

1966 - 2014

PERSONNEL COMMISSION:

Dr. Allan Pogrund, Chair

Daniel Gooch, Vice-Chair

Bob Ewing, Member

A G E N D A
PERSONNEL COMMISSION
OCEAN VIEW
SCHOOL DISTRICT

THURSDAY,
DECEMBER 11, 2014

4:30 P.M. REGULAR MEETING
BOARD ROOM – BUILDING A

1. **CALL TO ORDER**

TIME: _____ p.m.

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL**

4. **ELECTION OF OFFICERS:** In accordance with Merit Rule 2.1.6, the Personnel Commission shall elect one of its members Chair and another Vice-Chair.

Chair: Nominee: _____

(Action)

Moved: _____

Elected: _____

Second: _____

Vote: _____

Vice-Chair: Nominee: _____

(Action)

Moved: _____

Elected: _____

Second: _____

Vote: _____

5. **PUBLIC COMMENTS:** The Personnel Commission welcomes comments or concerns on any item within the jurisdiction of the Personnel Commission. If you wish to address an item on the agenda, please indicate when, at this point, or at the time the agenda item is discussed.

6. **APPROVAL OF MINUTES:** The Personnel Commission will receive the minutes of the September 11, 2014, Regular Personnel Commission Meeting, which were tabled due to lack of a quorum.

Pages 1-5

(Action)

Moved: _____

Second: _____

Vote: _____

APPROVAL OF MINUTES: The Personnel Commission will receive the minutes of the November 13, 2014, Regular Personnel Commission Meeting for approval.

Pages 6-8

(Action)

Moved: _____

Second: _____

Vote: _____

COMMISSION BUSINESS

- | | | |
|-----|---|---|
| 7. | <p>CONSENT CALENDAR: The Personnel Commission will receive the following items on the Consent Calendar:</p> <p>A. <u>RECRUITMENT AND TESTING:</u></p> <p>1. ELIGIBILITY LISTS: The Personnel Commission will receive the Director's recommendation to certify the following eligibility lists. (<i>Commissioners only.</i>)</p> <ul style="list-style-type: none"> • 2014 – 18 Department Secretary • 2014 – 19 Central Kitchen Coordinator • 2014 – 20 Instructional Aide • 2014 – 21 Speech and Language Assistant • 2014 – 22 Instructional Assistant – Severely Disabled • 2014 – 23 Instructional Assistant – Special Education | <p>Pages 9
(Action)</p> <p>Moved: _____</p> <p>Second: _____</p> <p>Vote: _____</p> |
| 8. | <p>CLASSIFIED ACTIVITY LISTS: The Personnel Commission will receive for information the following Classified Activity List(s) received by the Board of Trustees for their approval at the Ocean View School District, Regular Board Meeting(s) of:</p> <ul style="list-style-type: none"> • December 9, 2014 – (Exhibit A) | <p>Pages 10-14
(Information)</p> |
| 9. | <p>CLASSIFIED EVALUATION FORM: The Personnel Commission will receive the Director's recommendation to review, discuss, and adopt the proposed revisions to the Performance Evaluation Form for Classified Employees.</p> | <p>Pages 15-21
(Action)</p> <p>Moved: _____</p> <p>Second: _____</p> <p>Vote: _____</p> |
| 10. | <p>MERIT RULE REVIEW AND REVISION, CHAPTER 8, SECTION 11 – PERFORMANCE EVALUATIONS and MERIT RULE REVIEW AND REVISION, CHAPTER 7, SECTION 2.2 – STEP ADVANCEMENT – FIRST READING AND DISCUSSION: The Personnel Commission will receive the Director's recommendation to review and discuss the proposed changes to Merit Rule, Chapter 8, Section 11, Performance Evaluations and Merit Rule, Chapter 7, Section 2.2, Step Advancement for a first reading and discussion.</p> | <p>Pages 22-30
(Discussion)</p> |
| 11. | <p>MERIT RULE REVIEW AND REVISION, CHAPTER 8, SECTION 4.3 – RESIGNATIONS – FIRST READING AND DISCUSSION: The Personnel Commission will receive the Director's recommendation to review and discuss the proposed changes to Merit Rule, Chapter 8, Section 4.3, Resignations for a first reading and discussion.</p> | <p>Pages 31-33
(Discussion)</p> |

- 12. CSPCA CONFERENCE:** The Personnel Commission will receive the Director's recommendation to approve the attendance of the Director and the Personnel Analyst at the 2015 Statewide CSPCA Conference.

**Pages 34-35
(Action)**

Moved: _____
Second: _____
Vote: _____

COMMUNICATIONS

- 13. SECOND PUBLIC COMMENTS:** The Personnel Commission welcomes comments or concerns on any item within the jurisdiction of the Personnel Commission.

- 14. COMMISSIONERS' REPORTS**

- 15. DIRECTOR AND STAFF REPORTS**

- 16. ADJOURNMENT** **TIME:** _____ **p.m.** **Moved:** _____
Second: _____
Vote: _____

The Ocean View School District Personnel Commission meets on the 2nd Thursday of each month at 4:30 p.m. unless otherwise noted. Agendas are posted and are available 72 hours in advance of each regular meeting on the bulletin board outside the Board Room and on the District website, www.ovsd.org. Agenda items must be submitted in writing to the Director, Classified Personnel no later than the end of the working day seven days preceding the next Commission meeting. Items submitted less than a week before the scheduled meeting date may be postponed to a later meeting in order to allow sufficient time for consideration and research of the issue. For information call (714) 847-2551, extension 1400 or 1401.

Pursuant to Government Code 54957.5, a copy of all documents related to any item on this agenda that have been submitted to the Personnel Commission less than 72 hours prior to the meeting, and that are public record not otherwise exempt from disclosure, will be available for review at the Personnel Commission Office, 17200 Pinehurst Lane, Huntington Beach, California, 92647, during normal business hours (Monday through Friday, 8:00 a.m. to 4:30 p.m.)

Persons requiring accommodation in order to view the agenda or participate in the meeting may make the request for accommodation by contacting the Personnel Commission Office at 714-847-2551, extension 1400 or 1401, at least 48 hours in advance of the meeting. (Government Code 54954.2 (a)1)

**OCEAN VIEW SCHOOL DISTRICT
MINUTES
Regular Personnel Commission Meeting
September 11, 2014**

- CALL TO ORDER** Commissioner Pogrud called the September 11, 2014, Regular Personnel Commission Meeting to order at 4:30 p.m.
- PLEDGE OF ALLEGIANCE** Superintendent Balderas led the Pledge of Allegiance.
- ROLL CALL** Commissioner Gooch, Commissioner Pogrud, and Director Vellanoweth were present. Commissioner Ewing was absent.
- PUBLIC COMMENTS** Superintendent Balderas thanked the Commissioners for having him and stated that he really appreciates the Commission's work and the outstanding work Director Vellanoweth has been doing.

He stated that in the past there have been some tough budget reductions but classified positions are slowly starting to be filled again. As a District, he also wants to alert the Commission regarding the newly adopted Strategic Plan that will guide the District for the next five years. In terms of hiring quality personnel, the District's demographics have changed substantially. The District is now 55% minority, with close to 38% or 39% on free or reduced lunch. Superintendent Balderas stated that the District's minority status is approximately 36% Hispanic, and 13% Vietnamese, and it will only continue to increase. The state of California, overall, is about 52% Hispanic in terms of students. With that, the District will need to move forward in changing the quality of the personnel. Part of the Strategic Plan is how the District hires. The District will want to hire the best people, with what he calls value added, meaning they have additional skills, for example language skills. Superintendent Balderas said that he knows that the Personnel Commission has worked really hard to hire people with those skill sets that are needed in specific buildings.

He stated that our schools are doing great and that full modernization is being completed, as well. Modernization is going really well. Construction is being done at eleven school sites. Classified staff has been doing a lot of leg work by providing additional support, preparation, and cleaning.

Superintendent Balderas noted that on the agenda for today's meeting is an item for consideration relating to the Maintenance and Operations Manager, Gary Jordan, who has been with the District for a little over a year. He stated that Gary has been doing a fantastic job and he looks forward to working with him in the future.

He mentioned the role that Director Vellanoweth plays in working with Felix Avila, Assistant Superintendent, Human Resources, and how closely they work together, much like she did with John Lopez in the past. He stated that Director Vellanoweth has done great work under the Commissions guidance and thanked the Commissioners.

**MINUTES OF THE SEPTEMBER 11, 2014
REGULAR PERSONNEL COMMISSION MEETING**

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**MINUTES OF
AUGUST 14, 2014**

Motion by Commissioner Gooch to approve the minutes of the August 14, 2014, Regular Personnel Commission meeting.

Seconded by Commissioner Pogrund, and carried with a 2:0 vote.

COMMISSION BUSINESS

**CONSENT
CALENDAR**

The Personnel Commission received the following items on the Consent Calendar:

A. Job Description Reviews/Revisions:

1. Bus Driver
2. Community Liaison
3. Food Distribution Worker
4. Preschool Educator
5. Switchboard Operator/Receptionist

B. Recruitment and Testing - Eligibility Lists:

- | | |
|-----------|----------------------|
| 2014 – 8 | Painter |
| 2014 – 9 | Personnel Analyst |
| 2014 – 10 | Instructional Aide |
| 2014 – 11 | Child Care Attendant |

Motion by Commissioner Gooch to approve the Consent Calendar.

Seconded by Commissioner Pogrund, and carried with a 2:0 vote.

**RECOMMENDATION
TO REACTIVATE
CLASSIFICATION OF
DIRECTOR OF
MAINTENANCE,
OPERATIONS, AND
FACILITIES AND
RECOMMENDATION
TO RECLASSIFY
INCUMBENT, GARY
JORDAN, FROM
MAINTENANCE AND
OPERATIONS
MANAGER TO
DIRECTOR OF
MAINTENANCE,
OPERATIONS, AND
FACILITIES**

Director Vellanoweth stated that there have been some changes to the Maintenance and Operations Department. The District asked Ms. Vellanoweth to take a look at what changes have taken place, especially those of the Maintenance and Operations Manager.

Maintenance and Operations Manager is currently the top level management position in the Maintenance Department. The position has changed over the course of time. Shortly after the incumbent, Gary Jordan, accepted the position the District's Senior Facilities Planner, which was another management level position, resigned. Many of the tasks that were performed by the Senior Facilities Planner were assumed by the Maintenance and Operations Manager.

There have been some major projects going on throughout the District, as Superintendent Balderas mentioned. There is a huge modernization project going on that will be taking place over the course of the next two years, including ADA compliance, fire alarms, bathrooms, and roofing. The renovation of the four middle school gymnasium floors was just recently completed. Mr. Jordan has been assuming the responsibility for these projects in his current position.

**RECOMMENDATION
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OPERATIONS, AND
FACILITIES
(CONTINUED)**

As you see in the agenda item, Mr. Jordan has not been performing these duties for a full two years, which would consequently allow him to be reclassified without benefit of examination. However, there is a provision in the Commission rules that states a qualifying examination could be administered, which would be a pass/fail. If the incumbent passes the examination, he may be reclassified.

In reviewing Mr. Jordan's position, it appears from the Director's perspective, that a reclassification is in order. With that, Director Vellanoweth would like to recommend that the Commission reactivate the former job classification of Director of Maintenance, Operations, and Facilities and recommend that incumbent Gary Jordan be reclassified to that position, pending his passing a qualifying examination administered by the Personnel Commission staff.

Commissioner Gooch stated that he thinks it is an important part of the process to put aside inactivated classifications and leave them on a shelf, so that they may be brought back forward when needed, such as in this instance.

Commissioner Gooch had a question regarding the type of qualifying examination Director Vellanoweth mentioned. He asked whether Director Vellanoweth and/or the Personnel staff would be developing the exam, and who would administer it. He wanted to make sure it is completely independent and would avoid scrutiny if anyone were to ask questions. Director Vellanoweth answered that it is her goal that any test that the Commission administers be conducted in a fair and impartial manner. Her plan is to develop an oral technical interview by developing and obtaining questions from CODESP, our testing cooperative, that would be relevant to this position based upon the minimum qualifications and essential duties in the job description. Then there would be an oral panel with more than one person, with at least one panel member being an expert in the field who would be able to assess the incumbent's qualifications.

Commissioner Gooch asked if at the end of the examination, the panel members would be polled to find out if it was pass/fail, yes/no, right/wrong. Director Vellanoweth answered that she has not had experience in qualifying exams, but from the research she has done, it would be very similar to any other test given under a normal recruitment process. The only difference would be there is only one candidate going through the process. The panelists would be provided with a set of job relevant questions and a rating sheet with specific criteria, and then at the end instead of giving a numerical score, they would rate the candidate as pass or fail.

Motion by Commissioner Gooch to approve the reactivation of the classification of Director of Maintenance, Operations, and Facilities.

Seconded by Commissioner Poggrund, and carried with a 2:0 vote.

Motion by Commissioner Gooch to approve the reclassification of Gary Jordan from Maintenance and Operations Manager to Director of Maintenance, Operations, and Facilities, pending his passing a qualifying examination.

Seconded by Commissioner Poggrund, and carried with a 2:0 vote.

**RATIFY ADVANCED
STEP PLACEMENT –
JOEL ROSE,
MAINTENANCE
PLUMBER**

Director Vellanoweth stated that the Personnel Commission has recently conducted a recruitment for Maintenance Plumber. This is a new position for the District. Mr. Joel Rose seemed to be well above and beyond the qualifications that were required for the position. In order to provide Mr. Rose with a competitive salary to what he was earning in his previous position, and due to his level of training and experience, it is recommended that he be hired at Step 3 of the salary range.

Motion by Commissioner Gooch to approve the ratification of advanced step placement, Joel Rose, Maintenance Plumber.

Seconded by Commissioner Pogrund, and carried with a 2:0 vote.

**SECOND PUBLIC
COMMENTS**

There were no further comments from the public.

**COMMISSIONERS'
REPORTS**

Commissioner Pogrund stated that it is wonderful when a district recognizes talent within and moves employees into positions that they can fill and promotes them. He welcomed Roni Ellis and congratulated her on her new appointment.

Commissioner Pogrund mentioned the challenges of the District mentioned by Superintendent Balderas. He stated that he is excited about the prospect of change and that having a more diverse population is wonderful and gives the District strength. While there may be challenges, there are also opportunities to help children and that is what is important.

Commissioner Gooch mentioned that at the last meeting there was a comment made by a member of the public regarding the bilingual aspects of some job classifications. He had asked the Director for some information relative to this which was provided in the monthly memo given to the Commissioners, which he appreciates. He asked that if a member of the public were to come back to a subsequent meeting and inquire about this, would this information be made available to them.

Director Vellanoweth stated that she would be happy to share the information. She stated that as Superintendent Balderas mentioned, the District's bilingual student and family population has changed drastically over the course of the last few years. In response to the public comments from the last meeting, Director Vellanoweth wanted to outline the role of the District and the Board of Trustees, and the role of the Personnel Commission.

The role of the Board of Trustees and the District is to provide input to the Commission on the duties that are required for a position. With that, they also identify any skills that are relevant to the position, for example being able to read, write, or speak in a language other than English.

The Commission's role is to take those duties, responsibilities, and skill levels and to match them with a job classification, either a current job classification or by

**MINUTES OF THE SEPTEMBER 11, 2014
REGULAR PERSONNEL COMMISSION MEETING**

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**COMMISSIONERS'
REPORTS
(CONTINUED)**

developing a new one. This is what has been happening over the course of time.

During the last meeting's public comments, there was mention of several positions that were designated as bilingual. The District, in its role, did identify the duties required of these positions and indicated that certain bilingual skills would be required of the positions. With this, the Commission took the information and matched it to specific job classifications and conducted either a competitive recruitment or took the steps necessary to fill the positions.

Director Vellanoweth stated that at the last meeting, Commissioner Gooch had asked about a "trigger" that would trigger a bilingual position. There is information in the Education Code, § 45401, that provides that when at least 15% of the pupils enrolled in a K-12 school speak a primary language other than English, the Board shall hire a bilingual person for the administrative office of the school as soon as a position is available to serve as a bilingual employee. These circumstances prompted the District to recommend that certain classified positions be designated as bilingual.

As to how those positions are filled, it is the responsibility of the Commission and the Director, Classified Personnel, to make sure that the Merit System Rules and the C.S.E.A. contract are followed when conducting a recruitment or filling a position, whether it be competitively or through an administrative transfer. The Director's job it to make sure that anyone who is eligible for the position through a transfer is considered and that the process is conducted properly.

Commissioner Pogrand asked whether C.S.E.A. was aware of these triggers. Director Vellanoweth answered that she believes they are but she will share them with C.S.E.A.

**DIRECTOR AND
STAFF REPORTS**

Director Vellanoweth announced that Shristie Nair has promoted from Personnel Technician to Personnel Analyst, and we are currently in the process of a recruitment to replace her.

ADJOURNMENT

Motion by Commissioner Gooch to adjourn the September 11, 2014, Regular Personnel Commission Meeting.

Motion was seconded by Commissioner Pogrand, and carried with a 2:0 vote at 4:54 p.m.

Michelle Vellanoweth, Director, Classified Personnel
Secretary to the Personnel Commission

Date

**OCEAN VIEW SCHOOL DISTRICT
MINUTES
Regular Personnel Commission Meeting
November 13, 2014**

CALL TO ORDER Commissioner Gooch called the November 13, 2014, Regular Personnel Commission Meeting to order at 4:30 p.m.

PLEDGE OF ALLEGIANCE Commissioner Ewing led the Pledge of Allegiance.

ROLL CALL Commissioner Gooch, Commissioner Ewing, and Director Vellanoweth were present. Commissioner Pogrud was absent.

PUBLIC COMMENTS There were no comments from the public.

MINUTES OF SEPTEMBER 11, 2014 The minutes of the September 11, 2014, Regular Meeting of the Personnel Commission were tabled due to a lack of quorum.

COMMISSION BUSINESS

CONSENT CALENDAR The Personnel Commission received the following items on the Consent Calendar:

A. Job Description Reviews/Revisions:

1. Child Care Program Supervisor
2. Lead Mechanic
3. Mechanic
4. Mechanic Assistant

B. Recruitment and Testing - Eligibility Lists:

2014 – 12	Preschool Educator
2014 – 13	District Receptionist
2014 – 14	School Office Manager - Bilingual
2014 – 15	Personnel Technician
2014 – 16	Senior Purchasing Clerk
2014 – 17	Community Liaison Bilingual Assistant - Arabic

Director Vellanoweth explained that there had been some minor modifications to the job descriptions for Lead Mechanic, Mechanic, and Mechanic Assistant since the publication and distribution of the agenda. Revised pages were provided to the Commissioners and to the public.

She further explained that at one point the District had entertained the idea of having the mechanics be licensed to drive school buses with students on board to serve as back up bus drivers. This idea has been pulled for the time being. In the midst of trying to revise the job descriptions to include the appropriate licenses that would have been needed to transport students, and then going back to their not being responsible for transporting students, one of the licenses had failed to be

**MINUTES OF THE NOVEMBER 13, 2014
REGULAR PERSONNEL COMMISSION MEETING**

PAGE 2

**CONSENT
CALENDAR
(CONTINUED)**

removed. The item that was listed in the agenda item was a valid California Special Driver Certificate. This is not a requirement for a mechanic in order to drive a bus without students.

Parentheses were also added around the restricted school bus endorsement based upon the recommendation of the District's Driver Instructor.

Motion by Commissioner Ewing to approve the Consent Calendar.

Seconded by Commissioner Gooch, and carried with a 2:0 vote.

**CLASSIFIED
ACTIVITY LISTS**

The Personnel Commission received for information only, the Classified Activity Lists that were presented for approval to the Board of Trustees at the October 7, 2014, and the November 4, 2014, Board of Trustees meetings.

**SECOND PUBLIC
COMMENTS**

Sandy Vaughan, President of CSEA, commented that it is a pleasure to see the way the Commissioners work so well together, for the betterment of the District. She thanked the Commissioners for this and stated how much she appreciates all that the Commissioners do. She wished the Commissioners a happy Thanksgiving.

**COMMISSIONERS'
REPORTS**

Commissioner Ewing congratulated Dr. Pogrud on his reappointment to the Personnel Commission by the Board of Trustees.

Commissioner Ewing also reminded everyone that the next Personnel Commission meeting is scheduled for December 11, 2014.

Commissioner Gooch had nothing to report.

**DIRECTOR AND
STAFF REPORTS**

Director Vellanoweth stated that there have been some changes since the last Personnel Commission meeting in September, with a couple of temporary school closures. Those schools will be abated for asbestos. This has meant quite a few relocations for our staff members and students to some off site locations. She stated that on behalf of herself, the Personnel office, Human Resources, and the District, that she is pleased to see what a positive outcome has occurred in the midst of this challenging time. It has been nice to see our certificated staff and classified staff and administrators all working together and coming together as a team and a family. She stated that as a District, we have come a long way.

Commissioner Gooch asked where the District was in this process. Director Vellanoweth answered that she believes the target date is sometime in January for students and staff to come back to their sites.

Director Vellanoweth introduced the department's new Personnel Technician, Yvonne Nguyen, and stated how very happy we are to have her.

***MINUTES OF THE NOVEMBER 13, 2014
REGULAR PERSONNEL COMMISSION MEETING***

PAGE 3

ADJOURNMENT

Motion by Commissioner Ewing to adjourn the November 13, 2014, Regular Personnel Commission Meeting.

Motion was seconded by Commissioner Gooch, in honor of the valuable veterans who have served our country, and carried with a 2:0 vote at 4:41 p.m.

Michelle Vellanoweth, Director, Classified Personnel
Secretary to the Personnel Commission

Date

OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION

Memo

TO: Personnel Commissioners

FROM: Michelle Eifert
Personnel Assistant

DATE: December 11, 2014

SUBJECT: Agenda Item No. 7.A.1.: ELIGIBILITY LIST(S)

Background Information

The following eligibility list(s) are forwarded for ratification. These lists are confidential within the meaning of Education Code Section 45274 and Government Code Section 6254(g) along with other examination records and data. *(Commissioners only)*.

Following are the current lists for ratification:

2014 – 18	Department Secretary
2014 – 19	Central Kitchen Coordinator
2014 – 20	Instructional Aide
2014 – 21	Speech and Language Assistant
2014 – 22	Instructional Assistant – Severely Disabled
2014 – 23	Instructional Assistant – Special Education

Recommendation

The Director of Classified Personnel recommends the Personnel Commission ratify the following Classified Personnel Eligibility Lists, 2014 – 18, 2014 – 19, 2014 – 20, 2014 – 21, 2014 – 22, and 2014 – 23.

OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION

Memo

TO: Personnel Commissioners

FROM: Michelle Eifert
Personnel Assistant

DATE: December 11, 2014

SUBJECT: Agenda Item No. 8: CLASSIFIED PERSONNEL ACTIVITY LIST(S)

Background Information

At the Ocean View School District, Regular Board Meeting of December 9, 2014, (Exhibit A), the Board of Trustees received the Classified Personnel Activity List for approval.

These lists are provided for the Personnel Commissioners to review classified employee activity recently processed by Classified Personnel staff.

Recommendation

The Director of Classified Personnel recommends that the Personnel Commission receive the Classified Personnel Activity Lists of December 9, 2014.

OCEAN VIEW SCHOOL DISTRICT
Huntington Beach, California
Classified Personnel
December 9, 2014

<u>Approve Employment</u> <u>In accordance with Merit System testing procedures:</u>			
<u>NAME</u>	<u>POSITION</u>	<u>SALARY</u>	<u>RANGE</u> <u>STEP</u> <u>EFFECTIVE</u> <u>DATE</u>
Acosta, Esperanza	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1 10/06/14
Alvarez, Laureen	Instructional Aide	\$14,199 per hour	21.1 10/13/14
Anaya, Cynthia	Instructional Aide	\$14,199 per hour	21.1 10/07/14
Ayala, Yezmin	Preschool Educator	\$18,635 per hour	32.1 10/15/14
Bailey, Eddi	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1 10/06/14
Barajas, Janet	District Receptionist	\$3,053.00 per month	31.1 11/05/14
Bergeron, Salma	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1 10/06/14
Camacho, Raymond	Instructional Assistant - Physical Education	\$15,676 per hour	25.1 10/20/14
Clayton, Michael	Maintenance/Grounds Helper (substitute) Delivery Worker (substitute)	\$16,890 per hour \$18,176 per hour	28.1 09/22/14 31.1 09/22/14
Congelliere, Colleen	Instructional Assistant - Severely Disabled (substitute)	\$19,095 per hour	25.5 09/04/14
Davis, Paula	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1 10/06/14
DeGree, Kristen	Child Care Attendant	\$13,189 per hour	18.1 10/20/14
Diaz, Yazmin	Instructional Aide - Bilingual	\$14,554 per hour	22.1 10/13/14
Flores, Yeni	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1 10/06/14
Garcia, Marisela	Child Care Attendant	\$13,189 per hour	18.1 09/24/14
Greer, Michaela	Child Care Attendant	\$13,189 per hour	18.1 09/24/14
Habib, Samiha	Community Liaison Bilingual Assistant	\$15,676 per hour	23.2 10/29/14

OCEAN VIEW SCHOOL DISTRICT
Huntington Beach, California
Classified Personnel
December 9, 2014

Approve Employment (Continued)

In accordance with Merit System testing procedures:

<u>NAME</u>	<u>POSITION</u>	<u>SALARY</u>	<u>RANGE STEP</u>	<u>EFFECTIVE DATE</u>
Hammer, Patricia	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	10/06/14
Haskin, Ellen	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	10/06/14
Hunter, Victoria	Child Care Attendant	\$13,189 per hour	18.1	10/08/14
	Child Care Attendant (substitute)	\$13,189 per hour	18.1	10/08/14
	Instructional Aide (substitute)	\$14,199 per hour	21.1	10/08/14
	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	10/08/14
King, Randi	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	07/01/14
Manginelli, Leticia	Instructional Aide	\$14,199 per hour	21.1	09/29/14
Marchbanks, Allison	Instructional Aide	\$14,199 per hour	21.1	09/22/14
Marnolejo, Maria	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	10/06/14
Nguyen, Yvonne	Personnel Technician	\$3,374.00 per month	35.1	10/09/14
O'Brien, Aida	Instructional Aide - Bilingual	\$14,554 per hour	22.1	09/29/14
Orozco, Evangelina	School Office Manager (substitute)	\$20,577 per hour	36.1	10/06/14
	School Office Manager - Bilingual (substitute)	\$21,083 per hour	37.1	10/06/14
Rico, Maria	Preschool Educator (substitute)	\$18,635 per hour	32.1	09/23/14
Rojas, Priscilla	Instructional Aide (substitute)	\$14,199 per hour	21.1	10/06/14
Rosa, Isaac	Instructional Assistant - Severely Disabled (substitute)	\$15,676 per hour	25.1	10/06/14
	Instructional Assistant - Physical Education (substitute)	\$15,676 per hour	25.1	10/06/14
	Instructional Assistant - Special Education (substitute)	\$14,554 per hour	22.1	10/06/14
	Instructional Assistant - EL (substitute)	\$14,921 per hour	23.1	10/06/14
	Instructional Aide (substitute)	\$14,199 per hour	21.1	10/06/14

OCEAN VIEW SCHOOL DISTRICT
Huntington Beach, California
Classified Personnel
December 9, 2014

Approve Employment (Continued)

In accordance with Merit System testing procedures:

<u>NAME</u>	<u>POSITION</u>	<u>SALARY</u>	<u>RANGE STEP</u>	<u>EFFECTIVE DATE</u>
Ruiz Rivera, Aldo	Translator/Interpreter	\$19,095 per hour	33.1	11/03/14
Sheldon, Suzanne	Instructional Aide	\$14,199 per hour	21.1	09/25/14
Tran, Ngoc-Uyen	Instructional Aide	\$14,199 per hour	21.1	10/13/14
Urquiza, Perla	School Office Manager - Bilingual	\$3,542.00 per month	37.1	10/06/14
Welander, Yvette	School Office Manager (substitute)	\$20,873 per hour	36.1	07/01/14

Approve Retirement

<u>NAME</u>	<u>POSITION</u>	<u>START DATE</u>	<u>EFFECTIVE DATE</u>
Colliflower, Steven	Storekeeper	10/20/75	11/20/14

Approve Separation

In accordance with Merit System Rules 8.1 to 8.6:

<u>NAME</u>	<u>POSITION</u>	<u>REASON</u>	<u>START DATE</u>	<u>EFFECTIVE DATE</u>
Barrera, Adriana	Food Distribution Worker	Abandonment of Position	02/19/13	06/17/14
Chairez, Ernesto	Instructional Aide - Bilingual	Resignation - Another Job	01/30/07	11/07/14
Hunter, Victoria	Child Care Attendant	Resignation - Another Job	10/08/14	11/10/14
Quan, Nina	Instructional Aide	Resignation - Another Job	09/20/07	11/14/14
Stehle, Elsa	Instructional Aide (substitute)	Resignation - Moving	02/11/14	10/24/14
	Instructional Assistant - Special Education (substitute)	Resignation - Moving	02/11/14	10/24/14
	Instructional Assistant - Severely Disabled (substitute)	Resignation - Moving	02/11/14	10/24/14
	Instructional Assistant - EL (substitute)	Resignation - Moving	02/11/14	10/24/14
	Instructional Assistant - Physical Education (substitute)	Resignation - Moving	02/11/14	10/24/14
	Instructional Assistant - Adapted Physical Education (substitute)	Resignation - Moving	02/11/14	10/24/14

OCEAN VIEW SCHOOL DISTRICT
Huntington Beach, California
Classified Personnel
December 9, 2014

<u>Approve Separation (Continued)</u>			
<u>In accordance with Merit System Rules 8.1 to 8.6:</u>			
<u>NAME</u>	<u>POSITION</u>	<u>REASON</u>	<u>START DATE</u> <u>EFFECTIVE DATE</u>
Velasquez, Gladys	Instructional Assistant - EL	Resignation - Another Job	03/10/14 10/31/14
Villanueva, Cristian	Instructional Assistant - ABA	Resignation - No Longer Available	10/21/13 10/31/14
<u>Approve Leave of Absence Without Pay</u>			
<u>In accordance with Merit System Rules 8.10:</u>			
<u>NAME</u>	<u>POSITION</u>	<u>REASON</u>	<u>START DATE</u> <u>EFFECTIVE DATE</u>
Costales, Kristina	Instructional Assistant - ABA	Child Rearing Leave	11/17/14 11/21/14
Hutchins, Kristen	Instructional Assistant - ABA	Child Rearing Leave	10/29/14 01/02/15
Shehadeh, Faten	Instructional Aide	Child Rearing Leave	11/03/14 11/28/14
<u>Approve Professional Growth Payment</u>			
<u>In accordance with Board Policy 4133:</u>			
<u>NAME</u>	<u>POSITION</u>	<u>STIPEND</u>	<u>EFFECTIVE DATE</u>
Nair, Shristie	Personnel Analyst	\$900.00	12/10/14

OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION

Memo

TO: Personnel Commissioners

FROM: Michelle Vellanoweth
Director, Classified Personnel

DATE: December 11, 2014

SUBJECT: Agenda Item No. 9: Classified Evaluation Form

Background Information

During 2012-2013 negotiations between the District and California School Employees' Association (CSEA), both agreed to form a subcommittee to review the classified evaluation form and process. This subcommittee consisted of the Director, Classified Personnel, Ruben Paller and Sandy Vaughn on behalf of CSEA, and John Lopez, then Senior Director of Human Resources and Roni Ellis, then Director of Middle Schools, on behalf of the District. The subcommittee met for several months and worked closely with Principals and Administrators to recommend updates and changes to the classified evaluation form and process. The subcommittee completed its review of the classified evaluation form and process, which has been shared during recent negotiations.

On June 21, 2013, both the District and CSEA agreed to proposed revisions to the Performance Evaluation Form for Classified Employees. On June 27, 2013 both the District and CSEA agreed to contract language which reflects the proposed updates to the form and clarification of the evaluation process. On November 4, 2014 the Board of Trustees approved the Collective Bargaining Agreement between the Ocean View School District and CSEA which includes the proposed revisions to the Performance Evaluation Form for Classified Employees and revised contract language.

Merit System Rule 8.11.3.A stipulates that:

"Performance evaluation reports shall be made on forms prescribed by the Commission..."

Therefore, the Director presents the proposed revisions to the Performance Evaluation Form for Classified Employees for the Personnel Commission's review.

Attachments: Original Performance Evaluation for Classified Employees dated December 2003
Proposed revised Performance Evaluation for Classified Employees dated June 2013
Merit System Rule 8.11

.....

Recommendation

The Director recommends that the Personnel Commission review, discuss and adopt the proposed revisions to the Performance Evaluation Form for Classified Employees.

OCEAN VIEW SCHOOL DISTRICT

PERFORMANCE EVALUATION FOR CLASSIFIED EMPLOYEES

Employee Name: _____ School or Department: _____

Class Title: _____ Due Date: _____

Type of Evaluation: _____ 2 Month _____ 6 Month (Permanency) _____ Annual _____ Annual w/Merit

Indicate only those factors that apply to the employee's position

Check each applicable item: ☒ Satisfactory
☐ Needs Improvement
☐ Unsatisfactory

1. QUANTITY OF WORK

- ☐ Volume of work performed
- ☐ Completion of work on time
- ☐ Effective use of time

2. QUALITY OF WORK PERFORMED

- ☐ Accuracy
- ☐ Neatness
- ☐ Thoroughness
- ☐ Job knowledge

3. WORK HABITS

- ☐ Observance of working hours
- ☐ Attendance
- ☐ Observance of rules and regulations
- ☐ Ability to work without immediate supervision

4. ATTITUDES

- ☐ Acceptance of change
- ☐ Acceptance of direction
- ☐ Acceptance of responsibility
- ☐ Effectiveness under stress

5. RELATIONSHIPS WITH OTHERS

- ☐ Getting along with fellow employees
- ☐ Meeting and handling the public
- ☐ Working with students
- ☐ Exercises good judgment

6. OTHER (Use Comment Area)

7. SUPERVISORY ABILITY (For supervisors only)

- ☐ Planning and assigning
- ☐ Training and instructing
- ☐ Fairness and impartiality

Use comments space to describe employee's strengths and areas that need improvement or are unsatisfactory. Give examples of work well done and plans for improving performance where appropriate. A "Needs Improvement" or "Unsatisfactory" requires suggestions for improvement.

(Use additional sheets as necessary)

FOR 6 MONTH RATING:

It is recommended that this employee:

- ☐ Be granted permanent status
- ☐ Be terminated from this position

It is understood that signing this performance form acknowledges that the employee has received a copy and does not necessarily imply agreement. An employee may attach additional comments.

Supervisor _____ Date _____

Employee _____ Date _____

Principal or Department Head _____ Date _____

WHO IS EVALUATED?

WHO COMPLETES THE EVALUATION?

WHEN IS THE EVALUATION GIVEN?

Outstanding: To provide a record of commendation for outstanding work performance in a regular, day to day activity or in an unusually difficult and/or emergency situation.

Unsatisfactory: To provide a written confirmation that the employee has been told of his/her unsatisfactory service, to prepare for further disciplinary action, such as suspension, demotion, or dismissal.

These forms are available at the Personnel Commission Office.

WHAT SHOULD THE SUPERVISOR DO?

1. Review the work performance of the employee over the entire span of time covered by the evaluation. The supervisor is cautioned not to cover just the last few weeks before the due date of the evaluation.
2. Hold a conference with each employee for whom the evaluation is completed.
3. Explain to each employee:
 - a. The purpose and uses made of the evaluation form.
 - b. The basis for the specific evaluations.
 - c. Where appropriate, the suggestions for changes or improvements in work performance.
4. Sign the evaluation form and obtain the signature of the employee and the principal or department head.
5. Give the employee a photocopy, keep a copy for your records and forward the original to the Personnel Commission Office.
6. Inform the employee that they have the right to attach any comments of his/her own to the evaluation.

PURPOSE OF THE EVALUATION

Remember that an evaluation conference is a communication process. It affords an opportunity for both the employee and the supervisor to share ideas about work expectations and performance. It provides a forum to review goals and objectives and achieve mutual understanding about work priorities.

OCEAN VIEW SCHOOL DISTRICT

PERFORMANCE EVALUATION FOR CLASSIFIED EMPLOYEES

Employee Name: _____

Site or Department: _____

Class Title: _____

Due Date: _____

Type of Evaluation: _____ 2 Month _____ 6 Month _____ (Permanency Date) _____ Annual _____ Annual w/Merit

Indicate only those factors that apply to the employee's position:

- E** Exceeds Standards
- S** Satisfactory
- N** Needs Improvement
- U** Unsatisfactory
- X** Not Applicable

Exceeds Standards:
Satisfactory:
Needs Improvement:
Unsatisfactory:

Examples of exemplary work (Optional)
 Examples of work well done (Optional)
 Requires suggestions for improvement
 Requires factual evidence and documentation of previous discussions to be attached and directions/suggestions for improvement

1. QUANTITY OF WORK

- _____ Volume of work performed
- _____ Completion of work on time
- _____ Effective use of time

2. QUALITY OF WORK PERFORMED

- _____ Accuracy
- _____ Neatness
- _____ Thoroughness
- _____ Job knowledge

3. WORK HABITS

- _____ Observance of working hours
- _____ Attendance
- _____ Observance of rules and regulations
- _____ Ability to work without immediate supervision

4. ATTITUDE

- _____ Acceptance of change
- _____ Acceptance of direction
- _____ Acceptance of responsibility
- _____ Effectiveness under stress

5. RELATIONSHIPS WITH OTHERS

- _____ Getting along with fellow employees
- _____ Meeting and handling the public
- _____ Working with students
- _____ Exercising good judgement

6. SUPERVISORY ABILITY (If applicable)

- _____ Planning and assigning
- _____ Training and instructing
- _____ Fairness and impartiality

7. OTHER (Use Comment Area)

Optional: Mutually agreed upon suggestions for professional growth, goals and/or objectives, and work priorities:

Site or Department Administrator: Initial, Sign and Date

- _____ Met with employee
- _____ Did not meet with employee because:

Site or Department Administrator Signature

Date

FOR 6 MONTH PERMANENCY RATING:

It is recommended that this employee:

- _____ Be granted permanent status
- _____ Be terminated from this position

Employee: Initial, Sign and Date

- _____ Employee received copy
- _____ Employee understands signature does not imply agreement
- _____ Employee may attach additional comments

Employee Signature

Date

PURPOSE OF THE EVALUATION

Remember that an evaluation conference is a communication process. It affords an opportunity for both the employee and the evaluator to share ideas about work expectations and performance. It provides a forum to review goals and objectives and achieve mutual understanding about work priorities.

INSTRUCTIONS FOR PREPARING PERFORMANCE EVALUATION FORMS

WHO IS EVALUATED?

All permanent classified employees are evaluated annually on their anniversary date. "Annual with Merit" evaluations are relevant in determining whether an employee receives a step advancement. Step advancements are given only upon receipt of a satisfactory annual evaluation in accordance with Personnel Commission Rule 7.2.2.

Probationary employees (new employees or employees new to a classification) are evaluated at the end of the second (2nd) and fifth (5th) months of service. The 6 month evaluation is relevant in determining whether an employee is given permanent status.

WHO COMPLETES THE EVALUATION?

The Site or Department Administrator. Input can be considered from someone other than the Site or Department Administrator, such as the immediate line supervisor. This is the person who oversees, assigns and checks the daily work of the employee, or is the person who is most closely acquainted with the employee's work. As an example at the school site, a teacher may give input on their instructional aide but the Principal signs as the evaluator.

WHEN IS THE EVALUATION GIVEN?

Although Classified employees may be evaluated at any time, probationary employees are evaluated at the end of the second (2nd) and fifth (5th) months of service. The 6 month evaluation must be completed and returned to the Personnel Office prior to the end of the 6th month. If this evaluation is returned late, it may result in the employee receiving permanent status. Permanent employees are evaluated once a year on their anniversary date.

WHAT SHOULD THE EVALUATOR DO?

1. Review the work performance of the employee over the entire span of time covered by the evaluation. The supervisor is cautioned not to cover just the last few weeks before the due date of the evaluation.
2. Hold a conference with each employee for whom the evaluation is completed.
3. Explain to each employee:
 - a. The purpose and use of the evaluation form.
 - b. The basis for the specific evaluations.
 - c. Where appropriate, the suggestions for changes or improvements in work performance.
4. The Site or Department Administrator should initial, sign and date the evaluation form and have the employee initial, sign and date as well.
5. Give the employee a photocopy, keep a copy for your records and forward the original to the Personnel Commission Office.
6. Inform the employee that they have the right to attach any comments of his/her own to the evaluation.

CHAPTER 8: INSERVICE STATUS AND TRANSACTIONS

8.11 PERFORMANCE EVALUATIONS (BARGAINING UNIT EMPLOYEES SEE CONTRACT)

8.11.1 When Evaluations are to be Made

A periodic performance evaluation shall be filed with the Personnel Commission on each probationary employee and each employee in the permanent classified service, evaluating his or her on the job performance for the period covered in the report. Rating intervals shall be determined by the Commission.

A. Probationary employees shall be rated at the end of the second and fifth months of service. Administrative and executive classes having probationary periods of twelve (12) months shall be rated at the end of the fourth, eighth, and eleventh months of service.

B. Permanent employees shall be rated at least once each year by their anniversary date.

The Commission may provide for performance reports to be completed for temporary, substitute, and provisional employees.

8.11.2 Rating Supervisor

Each employee is to be rated by his or her immediate supervisor, defined as the person who assigns, checks, and supervises the work of the employee, is immediately responsible for the employee, and is the most closely acquainted with the employee's performance. If the employee has more than one immediate supervisor, each such supervisor may rate the employee's work performance.

8.11.3 Procedure to be Followed

A. Performance evaluation reports shall be made on forms prescribed by the Commission, which shall be completed by the employee's rating supervisor. The form may be reviewed by the next higher supervisor.

B. The immediate supervisor shall present the performance evaluation to the employee, and discuss it with him/her. Together they will analyze the employee's strong points and the areas in which improvement may be made.

C. The form shall be signed by the supervisor, by the employee to indicate receipt, and the Principal or Department Head, before being sent to the Personnel Commission Office. The employee will be given a copy of the completed performance evaluation form.

D. Evaluation shall be based upon knowledge and/or observation by the supervisor.

E. The employee shall have the right to respond in writing to the evaluation. Such response shall be attached to the evaluation and shall be placed in the employee's personnel file.

F. Performance evaluation reports shall be filed in the employee's personnel folder and shall be available for review in connection with promotional examinations and disciplinary actions.

G. Information of a derogatory nature to be placed in the permanent file shall not be entered or filed until the employee is given notice and an opportunity to review and comment thereon. Such review shall take place during the normal business hours, and employees shall be released from duty for this purpose without salary deduction provided timely notice is given to the supervisor in advance. An employee shall have the right to enter, and have attached to any such derogatory statement, his or her own comments, written independently of the above review.

8.11.4 Special Evaluations

- A. At any time, a supervisor may, with approval of his or her Department Head, issue to an employee a "Notice of Outstanding Performance" or a "Notice of Unsatisfactory Performance".
- B. Above notices shall be completed on forms provided by the Commission and shall give specific reasons for either of the notices.
- C. A copy of the notice shall be given to the employee and one copy placed in the employee's personnel file and shall be available for review in connection with promotional exams.

8.11.5 **Request for Reevaluation**

In the event the performance rating is unsatisfactory or the employee believes the rating does not accurately report his or her work performance, (s)he may request a review of the rating by the head of the department no later than 60 days from date of the original evaluation.

8.11.6 **Rating of Record**

When an employee terminates employment, his or her most recent rating on file shall be the rating of record, and no additional rating need be made unless his or her performance has changed to unsatisfactory.

OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION

Memo

TO: Personnel Commissioners

FROM: Michelle Vellanoweth
Director, Classified Personnel

DATE: December 11, 2014

SUBJECT: **Agenda Item No. 10: Merit Rule Review and Revision Chapter 8, Section 11**
PERFORMANCE EVALUATIONS
and
Merit Rule Review and Revision Chapter 7, Section 2.2
STEP ADVANCEMENT

FIRST READING AND DISCUSSION

Background Information

During 2012-2013 negotiations between the District and California School Employees' Association (CSEA), both agreed to form a subcommittee to review the classified evaluation form and process. This subcommittee consisted of the Director, Classified Personnel, Ruben Paller and Sandy Vaughn on behalf of CSEA, and John Lopez, then Senior Director of Human Resources and Roni Ellis, then Director of Middle Schools, on behalf of the District. The subcommittee met for several months and worked closely with Principals and Administrators to recommend updates and changes to the classified evaluation form and process. The subcommittee completed its review of the classified evaluation form and process, which has been shared during recent negotiations.

On June 21, 2013, both the District and CSEA agreed to proposed revisions to the Performance Evaluation Form for Classified Employees. On June 27, 2013 both the District and CSEA agreed to contract language which reflects the proposed updates to the form and clarification of the evaluation process. On November 4, 2014 the Board of Trustees approved the Collective Bargaining Agreement between the Ocean View School District and CSEA which includes proposed revisions to the Performance Evaluation Form for Classified Employees and revised contract language.

As Personnel Commission rule 8.11.3.A stipulates that performance evaluation reports shall be made on forms prescribed by the Commission, the Commission has been asked to review, discuss and adopt the proposed revisions to the Performance Evaluation Form for Classified Employees under a separate agenda item.

With the approval of these proposed revisions to the form, revisions must also be made to the associated Merit System Rules and Regulations regarding classified performance evaluations and step advancement. The proposed revisions to the Merit System Rules and Regulations will mirror the new language approved in the Collective Bargaining Agreement between Ocean View School District and CSEA.

Therefore, the Director presents the proposed revisions to Merit System Rule 8.11 Performance Evaluations and Merit Rule 7.2.2 Step Advancement for review and discussion.

Attachments: Article 9 Evaluation Procedures of the Collective Bargaining Agreement between the District and CSEA

Proposed revised Merit Rule 8.11, PERFORMANCE EVALUATIONS, dated 12/11/14

Proposed revised Merit Rule 7.2.2, STEP ADVANCEMENT, dated 12/11/14

Recommendation

The Director recommends that the Personnel Commission review, discuss and receive the proposed changes to Merit Rule, Chapter 8, Section 11, PERFORMANCE EVALUATIONS and Merit Rule, Chapter 7, Section 2.2, STEP ADVANCEMENT, for a first reading and discussion.

**Article 9 Evaluation Procedures of the Collective Bargaining Agreement between the
District and CSEA**

Article 9 Evaluation Procedures

9.1 When Evaluations Are to Be Made

- 9.1.1 ~~A periodic report of each probationary employee, and each employee in the permanent classified service shall be filed, evaluation his/her performance on the job for the period covered in this report. Performance evaluations for all permanent and probationary employees shall be filed with the Personnel Office.~~

9.1.2 Probationary employees shall be ~~rated~~ **evaluated** at the end of the second and fifth months of service by their site or department administrator.

9.1.3 Permanent employees shall be ~~rated~~ **evaluated** at least once a year on or before their anniversary date by their site or department administrator immediate supervisor, and at any time more than sixty (60) working days later when the employee leaves the control of that supervisor.

9.1.3.1 In the event a permanent employee has been under the supervision of a site or department administrator for less than two (2) months, the Director of Classified Personnel or administrative designee shall determine the employee's evaluator.

9.1.4 ~~An employee's anniversary date shall be established as their date of hire. If an employee's date of hire is before the 15th of the month, his/her anniversary date is established as the first of that month. If an employee is hired the 15th of the month or after, his/her anniversary date is established as the first of the following month. NOTE: Seniority date is date of hire in classification.~~

9.2 Rating Officers Evaluator

Each employee is to be ~~rated~~ **evaluated** by his/her immediate supervisor site or department administrator, who is defined as the person who assigns, checks, and supervises the work of the employee and who is immediately responsible for the employee, and is the most closely acquainted with the employee's performance. If the employee has more than one immediate supervisor site or department administrator, each such supervisor administrator may rate evaluate the employee's work performance.

9.3 Procedure To Be Followed

9.3.1 ~~If, in the judgment of the supervisor, the employee is performing in an unsatisfactory manner or needs improvement, the supervisor shall discuss the unsatisfactory performance with the employee prior to the completion of the formal performance evaluation and within a reasonable time frame to allow the employee to improve his/her performance to meet standards, prior the evaluation becoming final. A written Performance Improvement Plan may be utilized by the Supervisor and the employee to support the improvement process. The evaluation form shall be signed by the site or department administrator and the employee. The employee's signature indicates receipt of the evaluation form, but does not imply agreement. The original evaluation form shall be sent to the Personnel Office to be placed in the employee's personnel file. A copy of the evaluation shall be given to the employee.~~

9.3.2 ~~The evaluation form shall be signed by the supervisor, by the employee to indicate receipt, the Department Head, then sent to the Classified Personnel Office. At this point, the employee will also be given a copy of the rating.~~

Evaluations shall be based upon the knowledge and/or investigation of the supervisor.

9.3.3 ~~Evaluations shall be based upon the knowledge and/or investigation of the supervisor. The employee shall have the right to respond in writing within ten (10) work days to the evaluation. Such response shall be attached to the evaluation and shall be placed in the employee's personnel file.~~

9.3.4 ~~The employee shall have the right to respond in writing to the evaluation. Such response shall be attached to the evaluation and shall be placed in the employee's personnel file. If, in the judgment of the site or department administrator, the employee is performing in an unsatisfactory manner or needs improvement, the site or department administrator shall discuss the unsatisfactory performance with the employee prior to the completion of the formal performance evaluation and within a reasonable time frame to allow the employee to improve. A written Performance Improvement Plan may be utilized by the site or department administrator and the employee to support the improvement process. (see Appendix D)~~

9.3.5 Evaluation reports shall be available for review in connection with promotional examinations and disciplinary actions.

9.3.6 ~~Information of a derogatory nature to be shall not be placed in the an employee's permanent file shall not be entered or filed unless and until after the employee is given notice and an opportunity ten (10) work days' notice to review and comment thereon. Such review shall take place during normal business hours, and the employee shall be released from duty for this purpose without salary deduction. An employee shall have the right to enter, and have attached to any attach a rebuttal statement to any such derogatory statement, his/her own comments, written independently of the above review information.~~

9.4 Special Evaluations

9.4.1 At any time, a supervisor ~~site or department administrator~~ may, with approval of his/her Department Head, issue an employee a "Notice of Outstanding Performance" or a "Notice of Unsatisfactory Performance."

9.4.2 A copy of the notice shall be given to the employee and one copy placed in the employee's personnel file and shall be available for review in connection with the promotional exams.

9.5 Grievances Regarding Evaluation Procedures

The provisions of Article 5 (Grievances) shall be applied only to the procedural aspects of this article.

[Note: Implement the attached Performance Evaluation for Classified Employee form. Appendix F]

CHAPTER 8: INSERVICE STATUS AND TRANSACTIONS (DRAFT 12/11/14)

8.11 PERFORMANCE EVALUATIONS (BARGAINING UNIT EMPLOYEES SEE CONTRACT)

(Reference Education Code Sections 45260 and 45261)

8.11.1 Purpose of Performance Evaluations

- A. The employee performance evaluation report, embodying significant factors for the various positions, shall have reference to the quality and quantity of work done, and other characteristics which may be considered important in rating and reporting the ability, performance and efficiency of the respective employee(s) and the value of said employee(s) to the District service.
- B. The following rules provide the performance rating standards and procedures which shall be used in connection with eligibility for advancement, promotion, demotion, and dismissal from the Classified Service, as well as other decisions relative to members of the Classified Service. Such evaluation reports shall be one means by which a member of the Classified Service can learn how his/her supervisor feels about the quantity and quality of the work being performed by the employee and have the opportunity to discuss the matter with the supervisor. In addition, the completion and review of the evaluation report with the employee affords the supervisor an opportunity to review the employee's performance with him/her in an effort to correct work deficiencies, recognize the employee's accomplishments, set goals and objectives, and/or encourage the person to greater efforts in the performance of his/her duties and responsibilities.

8.11.24 When Evaluations are to be Made

A periodic performance evaluation shall be filed with the Personnel Commission on each probationary employee and each employee in the permanent classified service, evaluating his or her on the job performance for the period covered in the report. Performance evaluations for all permanent and probationary employees shall be filed with the Personnel Commission Office. Rating intervals shall be determined by the Commission.

- A. Probationary employees shall be rated evaluated at the end of the second and fifth months of service by their site or department administrator. Administrative and executive classes having probationary periods of twelve (12) months shall be rated at the end of the fourth third, eighth, sixth and eleventh months of service.
- B. Permanent employees shall be rated evaluated at least once each year by on or before their anniversary date by their site or department administrator. If an employee's date of hire is before the 15th of the month, his/her anniversary date is established as the first of that month. If an employee is hired the 15th of the month or after, his/her anniversary date is established as the first of the following month.

In the event a permanent employee has been under the supervision of a site or department administrator for less than two (2) months, the Director of Classified Personnel or administrative designee shall determine the employee's evaluator.

- C. The Commission may provide for performance reports to be completed for temporary, substitute, and provisional employees.

8.11.32 Rating Supervisor Evaluator

Each employee is to be rated evaluated by his or her immediate supervisor site or department administrator, who is defined as the person who assigns, checks, and supervises the work of the employee, employee and who is immediately responsible for the employee, and is the most closely acquainted with the employee's performance. If the employee has more than one immediate supervisor site or department administrator, each such supervisor administrator may rate evaluate the employee's work performance.

8.11.43 Procedure to be Followed

- A. Performance evaluation reports shall be made on forms prescribed by the Commission, which shall be completed by the employee's rating evaluating site or department administrator, ~~supervisor~~. The form may be reviewed by the next higher supervisor.
- B. The immediate supervisor shall present the performance evaluation to the employee, and discuss it with him/her. Together they will analyze the employee's strong points and the areas in which improvement may be made.
- C. The form shall be signed by the ~~supervisor, by the employee to indicate receipt, and the Principal or Department Head, before being sent to the Personnel Commission Office.~~ The employee will be given a copy of the completed performance evaluation form. site or department administrator and the employee. The employee's signature indicates receipt of the evaluation form, but does not imply agreement. The original evaluation form shall be sent to the Personnel Commission Office to be placed in the employee's personnel file. A copy of the evaluation shall be given to the employee.
- D. Evaluation shall be based upon knowledge and/or ~~observation~~ investigation by the supervisor.
- E. The employee shall have the right to respond in writing within ten (10) work days to the evaluation. Such response shall be attached to the evaluation and shall be placed in the employee's personnel file.
- F. If, in the judgment of the site or department administrator, the employee is performing in an unsatisfactory manner or needs improvement, the site or department administrator shall discuss the unsatisfactory performance with the employee prior to the completion of the formal performance evaluation and within a reasonable time frame to allow the employee to improve. A written Performance Improvement Plan may be utilized by the site or department administrator and the employee to support the improvement process.
- ~~GF.~~ Performance evaluation reports shall be filed in the employee's personnel folder and shall be available for review in connection with promotional examinations and disciplinary actions.
- ~~HG.~~ Information of a derogatory nature ~~to be~~ shall not be placed in the ~~an employee's permanent file shall not be entered or filed until after the employee is given notice and an opportunity~~ ten (10) work days' notice to review and comment thereon. Such review shall take place during the normal business hours, and employees shall be released from duty for this purpose without salary deduction provided timely notice is given to the supervisor in advance. An employee shall have the right to enter, and have attached to any attach a rebuttal statement to any such derogatory statement, his or her own comments, written independently of the above review information.

8.11.54 Special Evaluations

- A. At any time, a supervisor site or department administrator may, ~~with approval of his or her Department Head,~~ issue to an employee a "Notice of Outstanding Performance" or a "Notice of Unsatisfactory Performance".
- B. Above notices shall be completed on forms provided by the Commission and shall give specific reasons for either of the notices.
- C. A copy of the notice shall be given to the employee and one copy placed in the employee's personnel file and shall be available for review in connection with promotional exams.

8.11.65 Request for Reevaluation

In the event the performance rating is unsatisfactory or the employee believes the rating does not accurately report his or her work performance, (s)he may request a review of the rating by the head of

the department no later than 60 days from date of the original evaluation.

| 8.11.76 **Rating of Record**

When an employee terminates employment, his or her most recent rating on file shall be the rating of record, and no additional rating need be made unless his or her performance has changed to unsatisfactory.

7.2 APPLICATION OF SALARY SCHEDULES

7.2.2 Step Advancement

Step advancement shall not be granted automatically each year, but should be based upon performance by the employee which meets standards as reflected by his last performance evaluation report and upon specific recommendation for such adjustment by the employee's immediate supervisor with approval by Department Head site or department administrator.

OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION

Memo

TO: Personnel Commissioners

FROM: Michelle Vellanoweth
Director, Classified Personnel

DATE: December 11, 2014

SUBJECT: Agenda Item No. 11: Merit Rule Review and Revision Chapter 8, Section 4.3
RESIGNATIONS

FIRST READING AND DISCUSSION

Background Information

On April 8, 2014 the Board of Trustees adopted Board Policy 4217.2 regarding Classified Personnel Resignations.

As the protocol for classified employee resignations is also reflected in Ocean View's Merit System Rules and Regulations Chapter 8, section 4.3, the Director recommends the associated rule be updated to be consistent with new Board Policy approved by the Board of Trustees. The term "appointing power" is also suggested to be replaced with "site/departments administrator" to more clearly define the person who is immediately responsible for the employee.

The Director presents proposed revisions to Merit System Rule 8.4.3 Resignations for review and discussion.

Attachments: Ocean View School District Board Policy 4217.2, Classified Personnel Resignations,
dated 4/8/14.

Proposed revised Merit Rule 8.4.3 RESIGNATIONS, dated 12/11/14.

.....

Recommendation

The Director recommends that the Personnel Commission review, discuss and receive the proposed changes to Merit Rule 8.4.3 RESIGNATIONS, for a first reading and discussion.

OCEAN VIEW SCHOOL DISTRICT
Huntington Beach, California

BOARD POLICY

BP 4217.2

CLASSIFIED

PERSONNEL RESIGNATION

Any District employee who desires to resign his/her position shall submit, in writing, a letter of resignation which indicates the date which the employee intends as his/her last day at work. The Board of Trustees encourages employees to provide advance notice that is appropriate for the position they hold.

The Board of Trustees authorizes the Superintendent or designee to accept an employee's written resignation and to set its effective date. Once the Superintendent or designee has accepted and set an effective date for this resignation, the resignation may not thereafter be withdrawn by the employee.

Legal Reference:

EDUCATION CODE

35161 Board delegation of any powers or duties

44420 Failure to fulfill contract as ground for suspension of diplomas and certificates

44433 Unauthorized departure from service as unprofessional conduct

44930 Acceptance and date of resignation

45201 Power to accept resignation

CODE OF REGULATIONS, TITLE 5

80303 Reports of change in employment status

80304 Notice of sexual misconduct

COURT DECISIONS

American Federation of Teachers, Local #1050 v. Board of Education of Pasadena Unified School District, (1980) 107 Cal.App.3d 829

Policy Adopted: 04/08/14

CHAPTER 8: INSERVICE STATUS AND TRANSACTIONS (DRAFT 12/11/14)

8.4 REINSTATEMENTS AND RESTORATIONS *(Revised 02/23/06)*

8.4.3 Resignations

- A. When a classified employee desires to resign from a position, the employee shall present a written resignation, stating the reason(s) and effective date of the resignation to the ~~appointing power site/department administrator~~. A copy of the resignation shall be immediately filed by the ~~appointing power site/department administrator~~ with the Director, Classified Personnel.
- B. A resignation relates only to the specific position from which the employee resigns and does not impair the employee's rights to other positions which (s)he may hold on eligibility lists except that an employee who resigns shall have his/her name removed from promotional eligibility lists.
- C. ~~A resignation may be withdrawn, by the employee, at any time prior to acceptance by the Board of Trustees or its designee. Once the Superintendent or designee has accepted and set an effective date for a resignation, as authorized by the Board of Trustees, the resignation may not thereafter be withdrawn by the employee.~~

**OCEAN VIEW SCHOOL DISTRICT
PERSONNEL COMMISSION**

Memo

TO: Personnel Commissioners

FROM: Michelle Eifert
Personnel Assistant

DATE: December 11, 2014

SUBJECT: Agenda Item No. 12: CSPCA Conference

Background Information

The Personnel Commission maintains an annual membership with the California School Personnel Commissioners Association (CSPCA).

The 2015 Statewide CSPCA Conference is being held in San Diego, California, from Thursday, January 22 – Sunday, January 25, 2015.

The subject of the upcoming conference is The Merit System's Value in the Improving Economy. Over the 3 ½ day conference, some of the topics that will be discussed are unproctored testing, classification and compensation, performance evaluation and job analysis, and Merit System triumphs and challenges.

Financial Implications

The cost of registration for the full 3 ½ day conference for Member Districts is \$300. The first day of the conference, Thursday, January 22, is a half-day session that is open to Personnel Commission staff, and the cost for this day is \$80.

The estimated cost for this conference, which includes registration fees and mileage for both the Director and Personnel Analyst, is approximately \$650.

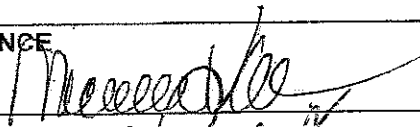

Recommendation

The Director of Classified Personnel recommends the Personnel Commission approve the Director, Classified Personnel's attendance at the 2015 Statewide CSPCA Conference for the 3 ½ day session, and the attendance of the Personnel Analyst, Shristie Nair, at the half day session for staff.

**OCEAN VIEW SCHOOL DISTRICT
WORKSHOP/MEETING/CONFERENCE ATTENDANCE REQUEST**

NAME OF WORKSHOP/MEETING/CONFERENCE: The Merit System's Value in the Improving Economy		
SPONSORING ORGANIZATION: CSPCA (California School Personnel Commissioners Association)		
LOCATION: San Diego, CA	DATE(S): January 22-25, 2015	
TOTAL COST PER PERSON: (Include Registration Fee, Transportation, Lodging, Meals, etc.) <u>\$325.00</u> (includes registration & mileage)		
NAME OF ATTENDEE(S)	DEPARTMENT/SCHOOL	ACCOUNT TO CHARGE
1. Michelle Vellanoweth, Director	Classified Personnel	01-443-130-74 5202
2. Shristie Nair, Personnel Analyst	Classified Personnel	01-443-130-74 5202
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

List additional attendee(s) on separate sheet and attach.

PURPOSE OF ATTENDANCE: Sessions include Unproctored testing; Classification and compensation; Employee development; Engagement, Retention, Staff motivators; Performance evaluation and job analysis; Merit System Triumphs and Challenges; etc.		
FUNDING	TOTAL COST	FUNDING SOURCE
General Fund		Funding Source:
Project or Restricted		Funding Source:
Other: PC Budget	\$650.00	01-443-130-74 5202
AUTHORIZATION SEQUENCE		
Signature of Supervisor <u></u>		Date: <u>12.2.14</u>
Approval recommended by <u></u> Asst. Superintendent, Administrator		Date: <u>12.2.14</u>
Signature of Superintendent _____		Date: _____
DATE OF BOARD MEETING APPROVAL: <u>January 6, 2015</u>		

