



PERSONNEL COMMISSION
AGENDA OF RESCHEDULED REGULAR MEETING
Friday, August 11, 2023 - 5:30 P.M.
37230 37th Street East, Room 125
Palmdale, CA 93550

In compliance with the American with Disabilities Act, if special assistance is required to participate in this meeting, contact the Personnel Commission Office at 661-285-2902. Notification 48 hours prior to the meeting will enable the Commission to make reasonable arrangements to ensure accessibility to this meeting.

Pursuant to Government Code 54954.2 (a) (1), the District is required to make documents (revised or otherwise) distributed to the Personnel Commission within 72 hours of a meeting, simultaneously available for public review, provided such documents are not otherwise exempt from public disclosure. Such documents will be available may for review at the Personnel Commission Office.

CALL TO ORDER

PLEDGE OF ALLEGIANCE TO THE FLAG

ROLL CALL: Mrs. Kathleen Duren, Chairperson
Mrs. Deneese Thompson, Vice Chairperson
Dale Speights, Commissioner

I. PRELIMINARY BUSINESS

ACTION

- | | |
|---|----------|
| A. Approve Minutes of Regular Meeting - June 14, 2023 | 01-23/24 |
| B. Approve Minutes of Special Meeting - June 27, 2023 | 02-23/24 |

II. PUBLIC COMMENTS

- A. Comments Referencing Items on the Agenda
- B. Comments Referencing Non-Agenda Items

Actions proposed for the Consent Agenda are items consistent with adopted rules and regulations of the Personnel Commission and are deemed routine in nature. They will be acted upon in one motion, without discussion, unless members of the Personnel Commission, staff, or a member in the audience requests an items removal. The item will be removed from the motion to approve and will be discussed immediately following the Consent Agenda.

III. CONSENT AGENDA

ACTION

- | | |
|--|----------|
| A. Approve Consent Agenda | 03-23/24 |
| 1. Ratification of Eligibility Lists
(Open, Substitute, Promotional Recruitments) | 08-23/24 |
| 2. Extension of Eligibility Lists | |
| 3. Nullification of Eligibility Lists | |
| 4. Ratification of Transfer | |

IV. NEW BUSINESS

ACTION

- | | |
|---|----------|
| A. Approve Agreement for Legal Services
Fagen Friedman & Fulfroost, LLP | 04-23/24 |
| B. Approve Job Description Revision for Substitute Classes
Exclude Language Re: Probationary Period Requirement for Driver's License | 05-23/24 |
| C. Approve Eligibility List with Less Than Three Ranks
Bilingual Early Childhood Teacher Assistant | 06-23/24 |

- | | <u>DISCUSSION/ACTION</u> |
|--|--------------------------|
| D. Consider and Classify Positions to Schematic List of Classes:
Social Emotional Learning Specialist
Noon Duty/Campus Assistant | 07-23/24 |
| | <u>ACTION</u> |
| E. Approve Eligibility List with Less Than Three Ranks
Mental Health-Intensive Case Manager | 09-23/24 |
| F. Approve Reclassification of Assistant Director, Business Services
to Assistant Director, Fiscal Services | 10-23/24 |
| G. Approve ADA Compliant Job Analysis
Assistant Director, Fiscal Services | 11-23/24 |
| H. Approve New Classification and Salary Schedule Placement
Assistant Director, Payroll/Accounting | 12-23/24 |
| I. Approve ADA Compliant Job Analysis
Assistant Director, Payroll/Accounting | 13-23/24 |
|
V. COMMENTS | |
| A. Personnel Commission Director - Recruitment/Staffing Updates | |
| B. Commissioners | |
|
VI. RECESS TO CLOSED SESSION | |
| A. With respect to every item of business to be discussed in closed session, pursuant to Government Code, Section 54957. | |
| 1. Confidential/Personnel Matters | |
|
VII. RECONVENE TO OPEN SESSION | |
|
VIII. REPORT OUT ANY ACTIONS TAKEN IN CLOSED SESSION | |
| A. With respect to every item of business to be discussed in closed session, pursuant to Government Code, Section 54957. | |
| 1. Confidential/Personnel Matters | |
|
IX. DATE/TIME OF NEXT PERSONNEL COMMISSION MEETING: September 19, 2023 at 5:30 P.M. | |

OPEN SESSION ADJOURNMENT _____ P.M

Personnel Commission
Palmdale School District
MINUTES OF REGULAR MEETING OF JUNE 14, 2023

37230 37th Street East, Room 125
Palmdale, CA 93550

The Personnel Commission Chairperson called the meeting of the Personnel Commission to order at 5:30 P.M., followed by the Pledge of Allegiance led by Commissioner Speights.

ROLL CALL:

Member(s) Present: Mrs. Kathleen Duren, Chairperson
Mrs. Deneese Thompson, Vice-Chairperson
Mr. Dale Speights, Member

Staff Present: Ms. Mary Theus, Personnel Commission Director
Mrs. Esthefany Iraheta, Administrative Secretary

PRELIMINARY BUSINESS

- A. The Personnel Commission took action to approve the minutes recorded at the May 10, 2023, regular meeting.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

- B. The Personnel Commission took action to approve the minutes recorded at May 23, 2023, special meeting.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

PUBLIC COMMENTS

- A. **Referencing Agenda Items**

Solange Henriquez, Director-Classified Personnel, spoke regarding the discussion item on the agenda. She reminded the Commission of the discussion held at the March 8, 2023 meeting regarding the District's intent to increase salary for substitute classes. She reported that the Substitute Paraeducator Certified Interpreter classification was inadvertently omitted. Therefore, she is addressing the Commission to convey the District's intent to correct the oversight by increasing the salary to align with step one of the appropriate range on the classified salary schedule. The same placement occurred for other substitute classes. Ms. Henriquez welcomed any questions or discussion from the Commission.

Francisco Padilla Director of Transportation, thanked the Commission for their consideration of the proposed Specialty Trip Driver job description. He stated that he will be available to answer any questions.

REPORTS/INFORMATIONAL ITEMS/DISCUSSION

A. Salary Rate Increase for Substitute Paraeducator Certified Interpreter

Commissioner Duren thanked Solange Henriquez for the background information and asked if the previous item contained all substitutes positions. Ms. Henriquez stated that it contained highly needed positions. The Commission had no further questions and supported the District's decision to remedy the salary oversight for this substitute classification.

CONSENT AGENDA

A. The Personnel Commission took action to approve the Consent Agenda as presented. The item passed unanimously.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

UNFINISHED BUSINESS

A. Approval of New Classification - Specialty Trip Driver

The Commission took action to approve the new classification titled Specialty Trip Driver, as well as the description and proposed salary placement, and new Transportation series job family. As no member was willing to second the motion, the motion dies for a lack of a second. The item failed, and the Commission proceeded to the next item.

Motion:	Dale Speights	Vote:	None
Second:	None		

NEW BUSINESS

A. Approval of ADA Compliant Job Analysis - Specialty Trip Driver

The Personnel Commission took action to approve the ADA Compliant Job Analysis for Specialty Trip Driver. As no member was willing to second the motion, the motion dies for a lack of a second. The item failed, and the Commission proceeded to the next item.

Motion:	Deneese Thompson	Vote:	None
Second:	None		

B. Approval of the 2023-2024 Agreement for Services - Shreds Unlimited

The Personnel Commission took action to approve the 2023-2024 Agreement for Services with Shreds Unlimited. The item passed unanimously.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

C. Approval of the Eligibility List with Fewer Than Three Ranks

Bilingual Early Childhood Education Teacher Assistant

The Personnel Commission took action to approve the eligibility list with fewer than three ranks for Bilingual Early Childhood Education Teacher Assistant. The item passed unanimously.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

D. Approval of the Provisional Appointment – Assistant Director, Business Services

The Personnel Commission took action to approve the appointment of Ann Modlin to serve provisionally as Assistant Director, Business Services, commencing June 15, 2023. Commissioner Duren conveyed concern regarding an absent Board item to indicate a leave of absence for the incumbent to support the District's request for a provisional appointment. Therefore, the Commission finds itself in a position to deny the appointment until the Board approves a leave. Ms. Theus stated that she confirmed the leave and period of absence for the incumbent prior to processing the District's request. The Commission acknowledged the verification, and hopes to see the leave of absence on a future Board agenda for approval. The item passed unanimously.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

E. Approval of the Regular Meeting Calendar for Fiscal Year 2023-2024

The Personnel Commission took action to approve the regular meeting calendar for fiscal year 2023-2024. The item passed unanimously.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

COMMISSION/STAFF COMMENTS

A. DIRECTOR

Ms. Theus outlined staff recruitment and testing activities. A copy is included as part of the official minutes. She mentioned that the Commission staff continues to onboard candidates, and test and interview as much as possible through the summer months. As per the Commission's request, Ms. Theus presented data for the 2021-2022 year to outline the number of new hires to the district and the associated costs for pre-employment processing (i.e. fingerprint, physical exams, drug testing as applicable).

B. COMMISSION

Commissioner Duren reviewed the data report provided by Ms. Theus, and expressed that the total pre-employment costs were far more than she expected it to be. She asked if the rates have increased, with Ms. Theus noting there have been no increases to date. Mrs. Duren thanked Ms. Theus and conveyed her appreciation for the time taken to complete the report.

Commissioner Thompson commented as well to acknowledge the amount of new hires processed by the Commission staff and the significant costs incurred by the District to bring classified employees on board.

RECESS TO CLOSED SESSION

Pursuant to Government Code Section 54957, the Commission recessed to a Closed Session at 5:49 p.m. and reconvened to Open Session at 6:34 p.m. There was no action taken to report out.

DATE OF NEXT MEETING

The next regular meeting of the Personnel Commission is scheduled July 12, 2023, at 5:30 p.m., Site 18 location; 37230 37th Street East, Room 125, Palmdale CA 93550.

OPEN SESSION ADJOURNMENT

On a motion by Commissioner Thompson, the meeting adjourned at 6:35 p.m.

Kathleen Duren
Chairperson
Approved: July 12, 2023

Deneese Thompson
Vice - Chairperson
Approved: July 12, 2023

Dale Speights
Member
Approved: July 12, 2023

Mary Theus
Director, Personnel Commission

REPORT FROM THE PERSONNEL COMMISSION DIRECTOR

RECRUITMENT UPDATE

OPEN RECRUITMENTS

Administrative Secretary	Expires 6/21/2023
AVID Tutor (Casual)	Continuous
Bilingual Administrative Clerk II	Expires 6/16/2023
Bilingual Administrative Secretary	Expires 6/21/2023
Bilingual Attendance Clerk	Expires 6/23/2023
Bilingual ECE Teacher Assistant	Continuous
Campus Security Assistant	Continuous
Certified Occupational Therapy Assistant	Continuous
Child Nutrition Assistant III	Continuous
ECE Teacher Assistant	Continuous
Mental Health Intensive Case Manager	Continuous
Noon Duty/Campus Assistant	Expires 6/22/2023
Occupational Therapist	Continuous
Paraeducator Certified Interpreter I/II	Continuous
Paraeducator LVN	Continuous
Paraeducator Moderate to Severe	Continuous
School Secretary	Expires 6/23/2023
Social Emotional Learning Specialist	Continuous
Special Education Instructional Assistant I	Continuous

EXAMINATION

Bilingual / ECE Teacher Assistant	6/15/2023
Bilingual Instructional Assistant	6/16/2023
Bilingual Typist Clerk	6/28/2023, 6/29/2023
Campus Security Assistant	6/22/2023
Family Services Advocate	6/23/2023, 6/28/2023
Noon Duty/Campus Assistant	7/5/2023
Paraeducator/LVN	6/26/2023
Paraeducator Moderate to Severe	6/20/2023, 6/26/2023
Special Education Instructional Assistant	6/20/2023, 6/26/2023

Personnel Commission
Palmdale School District
MINUTES OF SPECIAL MEETING OF JUNE 27, 2023

37230 37th Street East, Room 125
Palmdale, CA 93550

The Personnel Commission Chairperson called the meeting of the Personnel Commission to order at 11:10 a.m., followed by the Pledge of Allegiance.

ROLL CALL:

Member(s) Present: Mrs. Kathleen Duren, Chairperson
Mrs. Deneese Thompson, Vice-Chairperson
Mr. Dale Speights, Member

Staff Present: Ms. Mary Theus, Personnel Commission Director
Legal Representative: Mr. James Fernow, Attorney for the Personnel Commission

Commissioner Kathleen Duren read the hearing procedures for a hearing of appeal. The hearing began with an introduction of pertinent parties. One person attended and was excused when closed session commenced.

CLOSED SESSION

Pursuant to Government Code Section 54957:

A. **Discipline/Dismissal/Release**

Dismissal appeal hearing, Employee No. 11-E2-22/23, according to
Personnel Commission Rules and Regulation, Chapter 9, Item 9.3

RECESS TO CLOSED SESSION: 11:11 a.m.

RECONVENE TO OPEN SESSION: 11:18 a.m.

CALL TO ORDER: Commissioner Kathleen Duren called the meeting to order at 11:18 a.m.

REPORT OUT

Employee No. 11-E2-22/23, received notice of the hearing on June 27, 2023, at 11:00 a.m. As the employee was not present, the Commission granted an extra ten (10) minutes for arrival. The employee was not present at 11:10 a.m. for the hearing to commence.

As required by the Personnel Commission Rules and Regulations, Item 9.3, Hearing Procedure, Paragraph F, the Personnel Commission took action to sustain the Board's disciplinary action.

Motion:	Deneese Thompson	Vote:	Kathleen Duren	Aye
Second:	Dale Speights		Dale Speights	Aye
			Deneese Thompson	Aye

ADJOURNMENT

On a motion by Commissioner Deneese Thompson, the meeting adjourned at 11:19 a.m.

Kathleen Duren
Chairperson
Approved: July 12, 2023

Deneese Thompson
Vice - Chairperson
Approved: July 12, 2023

Mary Theus
Director, Personnel Commission

Dale Speights
Member
Approved: July 12, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	July 12, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF SUBSTITUTE LIST(S)	

STATUS

The testing procedure for establishment of an eligibility list for the classifications on the attached "Substitute/Casual Recruitment Summary Report" have been completed and the list(s) established as presented.

RECOMMENDATION

It is recommended that the eligibility list(s) for the attached classification(s) be ratified.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
July 12, 2023**

SUBSTITUTE/CASUAL RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Number on Referral List	Sent Referral List to Human Resources
Substitute Administrative Clerk	05/31/2023	Continuous	06/26/2023 06/27/2023	64	43	20	23	10	10	10	06/27/2023
Substitute Custodian	05/31/2023	06/13/2023	06/23/2023	75	38	20	18	N/A	16	16	06/26/2023 07/05/2023
Substitute Instructional Assistant	05/31/2023	Continuous	06/29/2023	18	15	10	5	N/A	8	8	Yes
Substitute Paraeducator Translator (DHH)	05/12/2022	Continuous	05/12/2023	1	1	1	0	N/A	1	1	06/23/2023

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
July 12, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	August 09, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF SUBSTITUTE LIST(S)	

STATUS

The testing procedure for establishment of an eligibility list for the classifications on the attached "Substitute/Casual Recruitment Summary Report" have been completed and the list(s) established as presented.

RECOMMENDATION

It is recommended that the eligibility list(s) for the attached classification(s) be ratified.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
August 9, 2023**

SUBSTITUTE/CASUAL RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Number on Referral List	Sent Referral List to Human Resources
Substitute Administrative Clerk	05/31/2023	Continuous	07/14/2023	48	29	18	11	9	9	9	07/14/2023
Substitute Child Nutrition Worker	05/31/2023	06/21/2023	07/13/2023	45	36	14	22	N/A	10	10	07/13/2023
Substitute Crossing Guard	05/31/2023	Continuous	07/13/2023	37	27	13	14	N/A	12	12	07/13/2023
Substitute ECE Teacher Assistant	07/05/2023	Continuous	07/14/2023	2	2	2	0	N/A	2	2	07/14/2023
Substitute Instructional Assistant	05/31/2023	07/21/2023	07/21/2023	13	11	6	5	N/A	5	5	07/26/2023

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
August 9, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	July 12, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF ELIGIBILITY LIST(S)	

STATUS

The testing procedure for establishment of an eligibility list for the classifications on the attached "Classified Recruitment Summary Report" have been completed and the list(s) established as presented.

RECOMMENDATION

It is recommended that the eligibility list(s) for the attached classification(s) be ratified.

Palmdale School District
Personnel Commission

July 12, 2023

CLASSIFIED RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	QAI Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Passed QAI	Number Eligible	List Effective Date	List Expiration Date	Merged *Yes/No	Total # of Ranks
Campus Security Assistant	03/30/2023	Continuous	06/09/2023 06/22/2023	06/29/2023	66	12	9	3	N/A	6	4	4	07/05/2023	07/04/2024	*Yes	8
Crossing Guard	05/03/2023	05/24/2023	06/07/2023	N/A	52	37	17	20	N/A	13	N/A	13	06/09/2023	06/08/2024	*Yes	12
ECE Teacher Asst	07/08/2022	Cont.	06/15/2023	NA	12	3	1	2	NA	1	NA	1	06/22/2023	06/21/2024	*Yes	5
Instructional Assistant I	05/11/2023	05/31/2023	06/14/2023	NA	64	61	30	31	NA	17	NA	17	06/15/2023	06/14/2024	*Yes	11
Lead Library Aide	04/28/2023	05/19/2023	05/25/2023	06/27/2023	22	10	8	2	8	8	7	7	06/27/2023	06/26/2024	No	6

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
July 12, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	August 09, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF ELIGIBILITY LIST(S)	

STATUS

The testing procedure for establishment of an eligibility list for the classifications on the attached "Classified Recruitment Summary Report" have been completed and the list(s) established as presented.

RECOMMENDATION

It is recommended that the eligibility list(s) for the attached classification(s) be ratified.

Palmdale School District
Personnel Commission

August 9, 2023

CLASSIFIED RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	QAI Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Passed QAI	Number Eligible	List Effective Date	List Expiration Date	Merged *Yes/No	Total # of Ranks
Bilingual Administrative Clerk II	05/29/2023	06/16/2023	07/13/2023	07/24/2023	71	28	13	15	4	4	4	4	07/25/2023	07/24/2024	*Yes	6
Bilingual ECE Teacher Asst	07/05/2023	Continuous	07/14/2023	N/A	5	1	1	0	N/A	0	N/A	0				
Bilingual Instructional Assistant	05/23/2023	06/12/2023	06/16/2023	08/01/2023	31	4	2	2	N/A	1	0	0				
Bilingual Instructional Assistant	06/21/2023	07/11/2023	07/19/2023	08/01/2023	31	9	5	4	N/A	2	2	2	08/03/2023	08/02/2024	*Yes	4
Bilingual Typist Clerk	05/22/2023	06/12/2023	06/28/2023 06/29/2023	07/17/2023	56	41	15	26	6	6	3	3	07/20/2023	07/19/2024	*Yes	7
Child Nutrition Assistant III	02/22/2023	Continuous	06/27/2023	07/11/2023	63	10	9	1	N/A	6	6	6	07/21/2023	07/20/2024	*Yes	9
Family Services Advocate	05/12/2023	06/02/2023	06/23/2023 06/28/2023	07/17/2023	29	8	4	4	2	2	2	2	07/21/2023	07/20/2024	*Yes	7
Instructional Assistant I	06/21/2023	07/11/2023	07/17/2023	N/A	67	56	23	33	N/A	15	N/A	15	07/18/2023	07/17/2024	*Yes	11
Library Aide	05/12/2023	06/02/2023	07/12/2023	07/27/2023	70	34	21	13	15	14	11	11	07/31/2023	07/30/2024	No	9
Noon Duty/Campus Assistant	06/01/2023	06/22/2023	07/05/2023	N/A	87	78	31	47	N/A	27	N/A	27	07/07/2023	07/06/2024	*Yes	10
Paraeducator Moderate-Severe	05/17/2023	Continuous	06/20/2023 06/26/2023	07/10/2023	27	7	5	2	N/A	5	3	3	07/10/2023	07/09/2024	*Yes	4
Special Education Instructional Assistant I	05/22/2023	Continuous	06/20/2023 06/26/2023	07/10/2023	30	30	17	13	N/A	10	6	6	07/10/2023	07/09/2024	*Yes	10

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
August 9, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE July 12, 2023 REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: EXTENSION OF ELIGIBILITY LIST(S)

STATUS

The eligibility list(s) for the following classifications still contain(s) a sufficient number of qualified ranks.

Job Classification	Effective Date	Expiration Date	Date Extended
Attendance Clerk	08/01/2022	07/31/2023	01/31/2024
Reprographics Technician	07/27/2022	07/26/2023	01/26/2024

RECOMMENDATION

It is recommended that the eligibility list(s) stated above be extended for a period of six months.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE July 12, 2023 REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: NULLIFICATION OF ELIGIBILITY LIST(S)

STATUS

The eligibility list(s) for the following classifications have expired or have insufficient ranks remaining.

Job Classification	Effective Date	Expiration Date
Bilingual ECE Teacher Assistant	06/07/2023	06/06/2024
Campus Security Assistant	05/12/2023	05/11/2024
Crossing Guard	03/14/2023	01/13/2024
ECE Teacher Assistant	06/07/2023	06/06/2024
Instructional Assistant I	04/07/2023	04/06/2024

RECOMMENDATION

It is recommended that the eligibility list(s) stated above be nullified.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE August 09, 2023 REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: NULLIFICATION OF ELIGIBILITY LIST(S)

STATUS

The eligibility list(s) for the following classifications have expired or have insufficient ranks remaining.

Job Classification	Effective Date	Expiration Date
Bilingual Administrative Clerk II	04/19/2023	04/18/2024
Bilingual Instructional Assistant	04/20/2023	04/19/2024
Bilingual Typist Clerk	10/19/2022	10/18/2023
Child Nutrition Assistant III	05/17/2023	05/16/2024
Family Services Advocate	10/28/2022	10/27/2023
Instructional Assistant I	06/15/2024	06/14/2024
Noon Duty/Campus Assistant	01/25/2023	01/24/2024
Paraeducator Moderate-Severe	04/12/2023	04/11/2024
Special Education Instructional Assistant I	05/12/2023	05/11/2024

RECOMMENDATION

It is recommended that the eligibility list(s) stated above be nullified.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	July 12, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF TRANSFER(S)	

STATUS

As provided for in the Personnel Commission Rules and Regulations and the Collective Bargaining Agreement, the Personnel Commission shall ratify transfers.

RECOMMENDATION

It is recommended that the Personnel Commission ratify the transfer(s) included as "Change of Status" from the Board Agenda.

Transfers and Reassignments**7/12/2023**

<u>Employee Name</u>	<u>Effective Date</u>	<u>Classification(s)</u>	<u>Comments</u>
a. Ayala Armenta, Ana L.	07/07/2023	From Special Ed. Instructional Assistant I (TA) 6.5 hrs/182 days, to Translator (Sp Ed) 8.0 hrs/ 12 mo.	Promotion Replacement for Laura Escalante
b. Barrios, Rosa C.	05/22/2023	From Special Ed. Instructional Assistant I (CA) 6.5 hrs/182 days, to Parent/Community Liaison (BS) 8.0hrs/182 days	Promotion Replacement for Susan Flores
c. Becerra, Wilman A.	08/03/2023	From Instructional Assistant I (DR) 5.75 hrs/182 days, to Bilingual Instructional Assistant (DR) 5.75 hrs/182 days	Promotion Replacement for Alondra Palacios
d. Esquivel, Stacey D.	08/03/2023	Bilingual Instructional Assistant, from (TW) to (LA) 5.75 hrs/182 days	Voluntary transfer Replacement for Iris Molina
e. Short, Kendrick L.	07/05/2023	Technology Support Liaison, from (BV) to (TA) 8.0 hrs/11 mo.	Voluntary transfer Replacement for Felix Ramos
f. Villalva, Martha E.	08/03/2023	From Noon Duty/Campus Assistant (DC) 5.75 hrs/182 days, to Bilingual Instructional Assistant (DC) 5.75 hrs/182 days	Promotion Replacement for Candelaria Avina Perales

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	August 09, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	RATIFICATION OF TRANSFER(S)	

STATUS

As provided for in the Personnel Commission Rules and Regulations and the Collective Bargaining Agreement, the Personnel Commission shall ratify transfers.

RECOMMENDATION

It is recommended that the Personnel Commission ratify the transfer(s) included as “Change of Status” from the Board Agenda.

Transfers and Reassignments**8/9/2023**

<u>Employee Name</u>	<u>Effective Date</u>	<u>Classification(s)</u>	<u>Comments</u>
a. Barajas, Michael A.	06/27/2023	Grounds/Utility Maintenance Worker II, from (PACS/SAGE) to (M&O) 8.0 hrs/12 mo.	Voluntary transfer Replacing Shane Pamplin
b. Burkey, Wendy	8/1/2023	Noon Duty/Campus Assistant, from (PLP) to (PT) 5.75 hrs/182 days	Reassignment; elimination of position Replacement for Crystal Ramos Mendez
c. Garcia, Maria G.	8/3/2023	From Noon Duty/Campus Assistant (DW) 5.75 hrs/182 days, to Child Nutrition Assistant I (MZ) 3.0 hrs/182 days	Promotion Replacement for Bobbi Jacobsen
d. Gonzalez, Tanya A.	8/3/2023	From Crossing Guard (Transp) 2.0 hrs/182 days, to Child Nutrition Assistant I (SH) 3.0 hrs/182 days	Promotion Replacement for Aide Santiago
e. Hall Jr., Donald L.	8/3/2023	From Custodian I (BS) 8.0 hrs/12 mo., to Child Nutrition Assistant I (MZ) 3.0 hrs/182 days	Demotion Growth
f. Martinez, Daisy	08/03/2023	From Child Nutrition Assistant I (CM) 3.0 hrs/182 days, to Child Nutrition Assistant II (YU) 5.75 hrs/182 days	Promotion Replacement for Berta Parra
g. Miller, Jaclyn M.	08/03/2023	Noon Duty/Campus Assistant, from (PLP) to (ECE) 5.75 hrs/182 days	Reassignment; elimination of position Replacement for Maria Zuniga
h. Montgomery, Elena	07/31/2023	ECE Teacher Assistant, from (TA, Rm 5) to (TA, Rm 3), 5.75 hrs/185 days	Voluntary transfer Growth
i. Sims, Leslie L.	07/11/2023	From Child Nutrition Assistant I (SH) 3.0 hrs/182 days, to Custodian I (DGM) 8.0 hrs/12 mo.	Promotion Replacement for Estevan Green
j. Valdivia, Juanita D.	08/03/2023	From Crossing Guard (Transp) 2.0 hrs/182 days, to Child Nutrition Assistant I (LA) 3.0 hrs/182 days	Promotion Replacement for Jonathan Diaz

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE	July 12, 2023	<u> </u> REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	APPROVE 2023-2024 AGREEMENT FOR LEGAL SERVICES FAGEN FRIEDMAN & FULFROST LLP	

BACKGROUND

Mr. Jay Fernow of the law firm of Fagen Friedman & Fulfrost, has served as the primary legal counsel for the Personnel Commission for many years.

STATUS

The Agreement for Legal Services to retain Fagen Friedman & Fulfrost as legal counsel for the Personnel Commission commencing July 1 is attached for approval. The professional rate schedule for services and associated expenses shows a slight increase from last year's schedule. This expense was projected in the approved Personnel Commission budget.

RECOMMENDATION

It is recommended that the Personnel Commission approve the 2023-2024 Agreement for Legal Services with Fagen Friedman & Fulfrost LLP as presented.



AGREEMENT FOR LEGAL SERVICES

This agreement is by and between Palmdale School District Personnel Commission (“Client”) and the law firm of Fagen Friedman & Fulfroft LLP (F3 Law) (“Attorney”). In consideration of the promises and the mutual agreements hereinafter contained, Attorney agrees to provide legal services to Client on the terms set forth below effective July 1, 2023:

1. **CONDITIONS.** This Agreement will not take effect, and Attorney will have no obligation to provide legal services, until Client returns a signed copy of this Agreement.

2. **SCOPE OF SERVICES.** Client hires Attorney as its legal representative/counsel with respect to matters Client specifically refers to Attorney. Attorney will provide those legal services reasonably required to represent Client. Attorney will take reasonable steps to keep Client informed of progress and to respond to Client’s inquiries.

3. **CLIENT’S DUTIES.** Client agrees to cooperate with Attorney and to communicate with candor while keeping the Attorney apprised of any information or developments which may come to Client’s attention, to abide by this Agreement, to pay Attorney’s bills on time and to keep Attorney advised of Client’s address and telephone number. Client will assist Attorney in providing information and documents necessary for the representation in the described matter.

4. **CONSULTANT SERVICES.** Attorney may provide consulting services, which may be referred to as Next Level Client Services, in addition to or in support of the legal services provided pursuant to this Agreement, through qualified non-attorney consultants, including but not limited to: governance training and assistance; communications services; education program planning and implementation; mentoring, coaching, and leadership; strategic planning and solutions; and advocacy at the local and state level.

5. **EMAIL COMMUNICATIONS/CLOUD-BASED COMPUTING.** In order to provide Client with efficient and convenient legal services, Attorney will frequently communicate and transmit documents using e-mail. In addition, Attorney uses a cloud computing service with servers located in a facility other than Attorney’s office. Most of Attorney’s electronic data, including emails and documents, are stored in this manner. Although Attorney will take reasonable precautions to keep email and other electronic data confidential and secure, because technology and cyber threats continue to evolve, there may be risks communicating and storing electronic data in this manner, including risks related to confidentiality and security. By entering into this Agreement, Client is consenting to such e-mail transmissions with Client and Client’s representatives and agents, as well as to having communications, documents and electronic data pertinent to Client’s matter(s) stored through a cloud-based service.

6. **LEGAL FEES AND BILLING PRACTICES.** Client agrees to pay by the hour, in minimum units of one tenth (.1) of an hour, at Attorney’s prevailing rates for all time spent on Client’s matter by Attorney’s legal personnel. Current hourly rates are noted in an attached rate schedule and the actual rate billed is based on the attorney’s number of years of experience.

The rates on this schedule, as well as the current job title designations/ classifications listed hereon, are subject to change on 30 days’ written notice to client. If Client declines to pay any increased

rates, Attorney will have the right to withdraw as Attorney for Client. The time charged will include the time Attorney spends on telephone calls relating to Client's matter, including calls with Client and other parties and attorneys. The legal personnel assigned to Client's matter may confer among themselves about the matter, as required and appropriate. When they do confer, each person will charge for the time expended, as long as the work done is reasonably necessary and not duplicative. Likewise, if more than one of the legal personnel attends a meeting or other proceeding, each will charge for the time spent.

7. COSTS AND OTHER CHARGES. (a) Attorney will incur various costs and expenses in performing legal services under this Agreement. Except as otherwise stated, Client agrees to pay for all costs, disbursements and expenses in addition to the hourly fees. These include fees fixed by law or assessed by public agencies, messenger and other delivery fees, out of office copying/reproduction costs, and travel costs (including mileage charged at the standard IRS rate, parking, transportation, meals and hotel costs, if applicable), and other similar items. The following costs shall not be charged:

In office Photocopying	No Charge
Facsimile Charges	No Charge
Postage	No Charge
On-line Legal Research Subscriptions	No Charge
Administrative Overhead	No Charge

(b) Out of town travel. Client agrees to pay transportation, meals, lodging and all other costs of any necessary out-of-town travel by law firm personnel. Client will also be charged the hourly rates for the time legal personnel spend traveling.

(c) Consultants and Investigators. To aid in the representation in Client's matter, it may become necessary to hire consultants or investigators. Client agrees to pay such fees and charges.

8. BILLING STATEMENTS. Attorney will send Client monthly statements for fees and costs incurred. Each statement will be payable within thirty (30) days of its mailing date. An interest charge of one percent (1%) per month shall be assessed on balances that are more than thirty (30) days past due. Client may request a statement at intervals of less than 30 days. If Client requests a bill, Attorney will provide one within 10 days. The statements shall include the amount, rate, basis of calculation or other method of determination of the fees and costs, which costs will be clearly identified by item and amount.

9. DISCHARGE AND WITHDRAWAL. Client may discharge Attorney at any time. Attorney may withdraw with Client's consent, for good cause or as allowed or required by law upon ten (10) days written notice. Good cause includes Client's breach of this Agreement, refusal to cooperate or to follow Attorney's advice on a material matter or any fact or circumstance that would render Attorney's continuing representation unlawful or unethical. When Attorney's services conclude, all unpaid charges will immediately become due and payable. Following the conclusion of Attorney's representation of Client, Attorney will, upon Client's request, deliver to Client the Client file(s) and property in Attorney's possession, whether or not Client has paid for all services. If Client has not requested delivery of the files, Attorney may destroy all such files in its possession seven (7) years after the conclusion of the representation.

10. DISCLAIMER OF GUARANTEE AND ESTIMATES. Nothing in this Agreement and nothing in Attorney's statements to Client will be construed as a promise or guarantee about the outcome of the matter. Attorney makes no such promises or guarantees. Attorney's comments about the outcome of the matter are expressions of opinion only. Actual fees may vary from estimates given.

11. ENTIRE AGREEMENT. This Agreement contains the entire agreement of the parties. No other agreement, statement, or promise made on or before the effective date of this Agreement will be binding on the parties.

12. MODIFICATION BY SUBSEQUENT AGREEMENT. This Agreement may be modified by subsequent agreement of the parties only by an instrument in writing signed by both of them or an oral agreement only to the extent that the parties carry it out.

13. SEVERABILITY IN EVENT OF PARTIAL INVALIDITY. If any provision of this Agreement is held in whole or in part to be unenforceable for any reason, the remainder of that provision and of the entire Agreement will be severable and remain in effect.

14. MEDIATION CLAUSE. If a dispute arises out of or relating to any aspect of this Agreement between the Client and Attorney, or the breach thereof, and if the dispute cannot be settled through negotiation, Attorney and Client agree to use mediation before resorting to arbitration, litigation, or any other dispute resolution procedure.

15. EFFECTIVE DATE. This Agreement will govern all legal services performed by Attorney on behalf of Client commencing with the date Attorney first performed services. The date at the beginning of this Agreement is for reference only. Even if this Agreement does not take effect, Client will be obligated to pay Attorney the reasonable value of any services Attorney may have performed for Client.

THE PARTIES HAVE READ AND UNDERSTOOD THE FOREGOING TERMS AND AGREE TO THEM AS OF THE DATE ATTORNEY FIRST PROVIDED SERVICES. THE CLIENT SHALL RECEIVE A FULLY EXECUTED DUPLICATE OF THIS AGREEMENT.

IN WITNESS WHEREOF, the parties have signed this Agreement for Legal Services.

Palmdale School District Personnel
Commission

Fagen Friedman & Fulfrost LLP

Namita S. Brown

Type or Print Name

Name

Managing Partner

Type or Print Title

Title



District Authorized Signature

Signature

DATE: _____

DATE: May 17, 2023



Fagen Friedman & Fulfroft LLP

**Please Return
Professional Rate
Schedule With
Contract**

PROFESSIONAL RATE SCHEDULE

Palmdale School District Personnel Commission
July 1, 2023

1. HOURLY PROFESSIONAL RATES

Client agrees to pay Attorney by the following standard hourly rate:

Associate	\$280 - \$310 per hour
Partner	\$345 - \$380 per hour
Senior Partner*	\$405 per hour
Senior Counsel/Of-Counsel	\$360 - \$380 per hour
Paralegal	\$195 - \$280 per hour
Law Clerk	\$280 per hour
Next Level Client Services	\$180 per hour
Education Consultant	\$285 per hour
Communications Services Consultant	\$305 per hour
Communications Services Associate	\$100 per hour
Technology Discovery Associate	\$50 per hour

**Partners with 25+ years of experience.*

Travel time shall be charged only from the Attorney's nearest office to the destination and shall be prorated if the assigned Attorney travels for two or more clients on the same trip. If Client requests a specific Attorney, Client agrees to pay for all travel time of that specific Attorney in connection with the matter. For matters concerning compliance with state and federal voting rights laws and/or related subjects, Client agrees to pay for all travel time of assigned Attorney in connection with those matters.

2. ON-SITE LEGAL SERVICES

At Client's discretion and by prior arrangement of Client and Attorney, Attorney may provide regularly scheduled on-site legal services ("Office Hours") to address legal issues that may arise in Client's day-to-day operations. Office Hours, which include time Attorney spends at Client's facility as well as travel time, shall be provided at a reduced hourly rate of 90% of the Attorney's standard hourly rate.

3. COSTS AND EXPENSES

In office Photocopying	No Charge
Facsimile Charges	No Charge
Postage	No Charge
On-line Legal Research Subscriptions	No Charge
Administrative Overhead	No Charge
Mileage	IRS Standard Rate

Other costs, such as messenger, meals, and lodging shall be charged on an actual and necessary basis.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE:	July 12, 2023		REPORT
TO:	Personnel Commission	<u> X </u>	ACTION
FROM:	Mary Theus Director, Personnel Commission		
RE:	JOB DESCRIPTION REVISION: DRIVER'S LICENSE AND PROBATIONARY PERIOD REQUIREMENT FOR SUBSTITUTE CLASSES		

BACKGROUND

Job descriptions for the following substitute classes contain language regarding the requirement of a California driver's license prior to the completion of a probationary period.

Substitute Custodian	Substitute Paraeducator Moderate to Severe
Substitute Paraeducator/LVN	Substitute Special Education Instructional Assistant

STATUS

The existing license and certification language in each job description is as follows:

- Possession of an appropriate, valid driver's license.
- Possession of an appropriate, valid California driver's license prior to the completion of the probationary period.
- Ability to be covered under the District property/liability insurance

As a probationary period is not pertinent to substitute staff, the language shown in the second bullet point will be removed.

RECOMMENDATION

It is recommended that the Commission approve the proposed job description revision for the referenced substitute classes.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE:	July 12, 2023		REPORT
TO:	Personnel Commission	<u> X </u>	ACTION
FROM:	Mary Theus Director, Personnel Commission		
RE:	APPROVE ELIGIBILITY LIST WITH LESS THAN THREE RANKS: BILINGUAL EARLY CHILDHOOD EDUCATION TEACHER ASSISTANT		

BACKGROUND

A primary function of the Personnel Commission is to recruit and select qualified candidates for employment with the District based on the merit system. Through the selection process, candidates are tested and ranked on the basis of their overall knowledge, skills, and abilities.

STATUS

Recruitment efforts for the Bilingual Early Childhood Education Teacher Assistant classification is challenging. The classification is posted continuously with positions difficult to fill because of the stringent minimum qualifications. There is one rank containing one eligible who met all minimum qualifications and successfully completed the competitive examination process.

To support the Early Childhood Education needs of the District, it is requested that an eligibility list be approved when qualified candidates are identified. The candidate will be merged to ranks on the existing list.

RECOMMENDATION

It is recommended that the Personnel Commission approve the eligibility list with fewer than three ranks for Bilingual Early Childhood Education Teacher Assistant as presented.

Palmdale School District
Personnel Commission

July 12, 2023

CLASSIFIED RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	QAI Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Passed QAI	Number Eligible	List Effective Date	List Expiration Date	Merged *Yes/No	Total # of Ranks
Bilingual ECE Teacher Asst	07/08/2022	Cont.	06/15/2023	NA	12	1	1	0	NA	1	NA	1	06/22/2023	06/21/2024	*Yes	1

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

** Remaining applicants from Hiring Event recruitment who did not meet deadline for testing and interviews.

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
July 12, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE: July 12, 2023 X REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: CONSIDER AND CLASSIFY POSITIONS TO SCHEMATIC LIST OF CLASSES

BACKGROUND

The Education Code gives authority to the Personnel Commission to classify positions. To classify, shall include, but not be limited to, arranging classes into occupational hierarchies, and determining reasonable relationships within the hierarchies.

STATUS

The District and CSEA Chapter 296, entered into a Memorandum of Understanding regarding the addition of Social Emotional Learning Specialist and Noon Duty/Campus Assistant positions to the CSEA bargaining unit. The classifications were previously unrepresented and excluded from the unit.

A reorganization of the Schematic List of Classes, an internal document of the Personnel Commission, is necessary to include the referenced groups. The current version of the Schematic is presented for review and discussion.

RECOMMENDATION

It is recommended that the Personnel Commission consider, classify, and approve placement of the referenced positions on the Schematic List of Classes as determined.

Palmdale School District
SCHEMATIC LIST OF CLASSES / SALARY RANGES
 (Classified)

ACCOUNTING AND RELATED CLASSES

	<u>RANGE</u>
Senior Payroll Clerk	39
Accounting/Data Processing Technician	35
Benefits/Payroll Clerk	35
Data Processing/Accounting Technician	35
Purchasing Technician	33
Accounting Clerk II	32
Accounting Clerk I	25

SECRETARIAL, CLERICAL, AND RELATED CLASSES

Credentials Analyst	38
Leaves Analyst	38
Personnel Analyst	38
Risk Management Specialist	38
Executive Assistant (Non Confidential)	38
Bilingual Registrar - High School	32
Administrative Secretary	31
Bilingual Administrative Secretary	31
Bilingual School Secretary	31
School Secretary	31
Personnel Administrative Clerk II	30
Personnel Administrative Clerk	27
Administrative Clerk II	26
Bilingual Administrative Clerk II	26
Attendance Clerk	26
Bilingual Attendance Clerk	26
Translator	26
Fingerprint Technician	25
District Receptionist	24
Project/Curriculum Center Clerk	22
Administrative Clerk I	21
Bilingual Typist Clerk	21

TECHNICAL, SPECIALIZED & RELATED CLASSES

IT Technician	40
Network Technician	40
Technology Technician	34
Facilities Planning Technician	34
Internet and Media Communications Specialist	34
Technology Support Specialist	34
Technology Support Liaison	30
Transportation Technician	27
Reprographics Technician	26
Lead Library Aide	21
Library Aide	19

HEALTH RELATED CLASSES

	<u>RANGE</u>
Certified Occupational Therapy Assistant	36
Health Technician - LVN	35
Health Assistant - LVN	35
Family Health Provider	35
Health Assistant	22

FOOD SERVICE CLASSES

Inventory/Procurement Specialist	33
Child Nutrition Manager	28
Child Nutrition Assistant III	20
Child Nutrition Assistant II	19
Child Nutrition Assistant I	17

INSTRUCTIONAL ASSISTANT CLASSES

Paraeducator - Certified Interpreter II	39
Paraeducator - Certified Interpreter	37
Paraeducator / LVN	35
Paraeducator - Translator	27
Paraeducator-Moderate to Severe	26
Speech/Language Pathology Assistant	24
Special Education Instructional Assistant III	21
Speech Education Assistant	20
Instructional Assistant III	20
Bilingual Instructional Assistant	19
Special Education Instructional Assistant II	18
Bilingual Early Childhood Education Teacher Assistant	17
Early Childhood Education Teacher Assistant	17
Instructional Assistant II	17
Special Education Instructional Assistant I	16
Instructional Assistant I	16

UTILITY CLASSES

Maintenance Worker II - Certified	40
Maintenance Worker III	40
Maintenance Worker II	36
Grounds/Utility Maintenance Worker II - Certified	33
Maintenance Worker I	32
Grounds/Utility Maintenance Worker II	29
Custodian II	28
Warehouse Worker/Delivery Driver II	27
Custodian I	26

SOCIAL SERVICE ASSISTANT CLASSES

	<u>RANGE</u>
Student Engagement Advocate	30
Student Interventionist	27
Family Services Advocate	23
Parent/Community Liaison	21

STUDENT SAFETY CLASSES

Campus Security Assistant	22
Crossing Guard	15

UNREPRESENTED

	<u>RATE</u>
Noon Duty/Campus Assistant	Min. Wage
Occupational Therapist	Hourly
Social Emotional Learning Specialist	Hourly

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE:	August 09, 2023		REPORT
TO:	Personnel Commission	<u> X </u>	ACTION
FROM:	Mary Theus Director, Personnel Commission		
RE:	APPROVE ELIGIBILITY LIST WITH LESS THAN THREE RANKS: MENTAL HEALTH-INTENSIVE CASE MANAGER		

BACKGROUND

A primary function of the Personnel Commission is to recruit and select qualified candidates for employment with the District based on the merit system. Through the selection process, candidates are tested and ranked on the basis of their overall knowledge, skills, and abilities.

STATUS

Recruitment efforts for the Mental Health-Intensive Case Manager classification is challenging. The classification is posted continuously with positions difficult to fill because of the stringent minimum qualifications. There is one rank containing one eligible who met all minimum qualifications and successfully completed the competitive examination process.

To support the needs of the District, it is requested that an eligibility list be approved when qualified candidates are identified. The candidate will be merged to ranks on the existing list.

RECOMMENDATION

It is recommended that the Personnel Commission approve the eligibility list with fewer than three ranks for Mental Health-Intensive Case Manager as presented.

Palmdale School District
Personnel Commission

August 9, 2023

CLASSIFIED RECRUITMENT SUMMARY REPORT

Job Classification	Recruitment Open Date	Recruitment Close Date	Written Exam Date	QAI Date	Number of Applicants	Passed MQs invited to test	Exam Participants	Participant No Shows / Declined	Passed Performance	Passed Written	Passed QAI	Number Eligible	List Effective Date	List Expiration Date	Merged *Yes/No	Total # of Ranks
Mental Health-Intensive Case Manager	03/14/2023	Continuos	N/A	7/10/2023	1	1	1	0	N/A	N/A	1	1	7/20/2023	7/19/2024	No	1

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

The eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.

Director, Personnel Commission
August 9, 2023

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE August 09, 2023 _____ REPORT

TO: Personnel Commission _____ X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: APPROVE RECLASSIFICATION OF POSITION FROM
ASSISTANT DIRECTOR, BUSINESS SERVICES TO ASSISTANT DIRECTOR, FISCAL SERVICES

BACKGROUND

A job description currently exists for Assistant Director, Business Services. There has been a significant increase in the position's scope, complexity, and responsibilities that require a more specific skill set. A new job description is necessary to more clearly define the position.

STATUS

The administrative responsibilities within the Fiscal Services Department has increased over several years. In order to more appropriately identify the essential functions, duties and responsibilities of the Assistant Director-level position, it warrants reclassification for assignment of a new job profile that is now presented as Assistant Director, Fiscal Services, with no change to the existing pay schedule. It will replace and nullify the current position of Assistant Director, Business Services.

Staff members will not be affected by the proposed reclassification as there is only one incumbent who is resigning.

RECOMMENDATION

It is recommended that the Personnel Commission approve the reclassification effective August 12, 2023, as presented, and nullify the Assistant Director, Business Services classification.

ASSISTANT DIRECTOR, FISCAL SERVICES

Bargaining Unit: Management

SALARY RANGE

\$78,060.00 - \$99,626.00 Annually

(Leadership Team Salary Schedule)

BASIC FUNCTION:

Under the general direction of the Fiscal Services Administrator, lead and participate in planning, directing, and supervising the operations and activities of the accounts payable department; perform accounting functions, oversee, and manage the processing, auditing, approval, maintenance, and completion of accounts payable, accounts receivable and related fiscal transactions and records; supervise and evaluate the performance of assigned staff; perform related duties as assigned.

ESSENTIAL DUTIES/RESPONSIBILITIES

- Perform, plan, organize, and oversee the day-to-day operations of the accounts payable department to ensure accurate and timely processing of the District's operational expenditures in compliance with relevant laws, codes, rules, regulations, policies, and procedures.
- Oversee and supervise complex fund accounting, and revenue reconciliations; identify problems and implement solutions; and make recommendations for appropriate complex accounting-related actions.
- Analyze and prepare an array of financial statements, compliance and cash flow reports, and communicate results of financial analyses to the Fiscal Services Administrator.
- Develop, recommend, and implement policies and procedures for accounts payable, invoicing, accounts receivable, and other related processes, with an emphasis on improving efficiencies.
- Coordinate and participate in the preparation and processing of department documents with a focus on improving the overall effectiveness of customer service.
- Ensure accurate and timely payment of District obligations, including reimbursements for employee mileage, and other conferences and travel.
- Supervise the creation and issuance of purchase orders according to established reporting timelines for approval by the District's Board of Trustees.
- Serve as liaison with the Los Angeles County Office of Education and third-party agencies regarding District taxes, such as fuel tax, and sales and use tax.
- Oversee, analyze, process, and verify balances on accounts payable balances with vendors and accounts receivable balances from customers; reviews expenditure and revenue ledgers, and reconcile balance sheet account balances.
- Participate in the interview, selection, supervision, and evaluation of assigned accounting staff; confer with the Fiscal Services Administrator on employment and/or disciplinary actions as required.
- Plan, coordinate and arrange for appropriate training for assigned personnel; develop and initiate departmental activities, orientations, and in-services to review policies and procedures of the department, Palmdale School District, and changes to accounting regulations.
- Manage the timely reconciliation of all District bank accounts, including school Associated Student Body (ASB) accounts.
- Responsible for internal audits of ASB accounts; review internal controls for cash and revenue collections and communicate corrective actions if deemed necessary.
- Make timely deposits into the District's local bank accounts, and subsequent timely deposits into the Los Angeles County Treasury.

- Update and maintain the District's equipment and asset records with additions, disposals, dispositions; calculate annual depreciation expense and ensure completion of periodic physical inventory of the equipment and asset records.
- Research, interpret, apply, and explain complex laws, codes, rules, regulations, policies, procedures pertaining to the accounting functions; identify legislative changes, analyze their impact on the District's expenditure operations, and ensure compliance with such changes.
- Serve as a technical resource for accounting functions, including advising administration and staff of changes to departmental procedures; researches and responds to inquiries pertaining to payable functions, transactions, practices, policies, and procedures.
- Collaborate with school site personnel, management, and other departments to analyze and resolve a variety of expenditure and revenue issues.
- Supervise and participate in fiscal and calendar year-end closing procedures.
- Use independent judgment and interpretive abilities and identifies problems which require supervisory attention
- Coordinate with the Los Angeles County Office of Education (LACOE) to maintain the integrated automated accounting system and serves as the District's primary accounting liaison for vendors and customers.
- Coordinate and assist in the preparation of accounting records for court subpoenas, external auditors, and other review agencies, such as the California Department of Education.
- Prepare, audit, and submit a variety of financial and statistical reports; oversee and participate in the maintenance and organization of expenditure and income records, files, and reports from a wide variety of accounts and funding sources.
- Participate in a variety of meetings, trainings, and workshops to maintain up-to-date knowledge and skills.
- Demonstrate behavior that reflects established professional responsibilities (i.e., attendance, punctuality, professional dress and verbal/nonverbal communication).
- Demonstrate knowledge of Board Policies and Administrative Regulations as they relate to the position.
- Assumes duties for financial functions in the absence of the Fiscal Services Administrator or as needed.
- Perform other related job duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

KNOWLEDGE AND ABILITIES

Knowledge of:

1. Fundamental accounts payable and general accounting procedures and guidelines including state, federal, and local laws, codes, and regulations
2. Pertinent federal, state, county, county office of education, and other pertinent provisions regulating District accounts payable and accounting
3. Generally accepted accounting principles (GAAP) and procedures and their application to basic accounting transactions
4. Auditing and compliance reporting and reviews
5. Interpersonal skills using tact, patience, and courtesy
6. Microsoft Office programs, including Word, Excel, PowerPoint
7. Correct language usage, grammar, spelling, and punctuation
8. Principles of supervision and training
9. Public speaking techniques
10. Budgeting practices regarding monitoring and control
11. Office organization and general management practices
12. Report preparation and record keeping

Ability to:

1. Learn district organization, operations, policies, regulations and procedures
2. Read, interpret, apply, and explain laws, codes, rules, regulations, procedures pertaining to accounts payable, accounts receivable and general accounting
3. Establish and maintain cooperative and effective working relationships with district management, staff, external auditors, representatives of the Los Angeles County Office of Education, and others encountered in the course of work
4. Maintain accurate and interrelated financial records, including preparing complex statistical information and reports
5. Make mathematical calculations quickly and accurately
6. Maintain the security of confidential materials
7. Train others in the proper use of the accounting software system and other operational software utilized by the District.
8. Analyze situations accurately and adopt an effective course of action
9. Comprehend and follow directions given verbally and in writing
10. Tolerate stress and maintain composure in the face of high workload, competing or conflicting demands; work within rules and policy.
11. Ability to work on several tasks with frequent interruptions.
12. Demonstrate mental acuity sufficient to perform the essential functions of the position
13. Communicate effectively with staff both orally and in written communications
14. Write effectively, with proper English usage, spelling, grammar, punctuation and stylistic proficiency
15. Meet schedules and timelines, which may include working evenings, early mornings, and weekends as required.
16. Work independently under general direction
17. Be motivated to produce high quality work product, including attending workshops and trainings outside of assigned working hours in those areas in which formal training is needed
18. Maintain a work pace appropriate to the position in an office environment with frequent interruptions and changing priorities

REQUIRED EDUCATION AND EXPERIENCE**Education**

An Associate degree or higher from an accredited college or university is preferred, with major coursework in accounting, business administration, or a related field.

Experience

Minimum of four (4) years of experience preparing and processing general accounting entries in an automated system, including one year of experience training, leading, or supervising others, preferably in a district-level school setting.

Substitution: Up to two years of experience may be substituted for a Bachelor's or higher degree, with major coursework described.

LICENSE AND CERTIFICATION

Possession of an appropriate, valid California driver's license.

Ability to be covered under the District property/liability insurance.

WORKING CONDITIONS:

Work Environment: Work is performed primarily in an Indoor office environment.

Physical Demands: Ability to sit for extended periods of time; some walking and standing; lifting, carrying, pushing and/or pulling, twisting at waist, bending, stooping squatting, and reaching; vision and hearing in normal range with or without correction, sufficient to read computer screen and printed documents, and listen to personnel and the public (telephone or in-person); dexterity of hands and fingers to operate standard office and computer equipment.

NOTE: Occasionally, the position requires the employee to work irregular or extended hours.

ASSISTANT DIRECTOR, BUSINESS SERVICES

Bargaining Unit: Management

SALARY RANGE

\$78,060.00 - \$99,626.00 Annually

BASIC FUNCTION:

Under the direction of the Director of Accounting, assists in the coordination, planning, organization, supervision and overseeing of the operations and functions of assigned financial programs of the District.

EXAMPLE OF DUTIES:

Duties may include, but are not limited to, the following:

1. Organize, supervise and review assigned accounts payable programs in order to ensure compliance with federal and state laws, regulations, and codes, and school district policies.
2. Supervise and maintain the integrity of the in-house financial system.
3. Participate in the selection, training, supervision and evaluation of assigned staff.
4. Prepares or directs the preparation and maintenance of a variety of financial, narrative and statistical reports, records and files related to assigned activities.
5. Prepares or oversees the direction of, reports required by the State and Federal government.
6. Assumes duties for financial programs in the absence of the Director of Accounting or as needed.
7. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS:

Knowledge of:

1. Current theory, principles, and practice of modern school district business and financial management.
2. Budget preparation and control; methods and techniques of cost analysis.
3. Financial analysis and projection techniques.
4. Principles and practices of public and business administration, supervision, and training.
5. Pertinent federal, state and local laws, codes and regulations.
6. The application of electronic data processing to financial transactions.
7. Fundamentals of good public relations.

Ability to:

1. Plan, direct and coordinate activities with other business management functions.
2. Prepare clear, concise financial reports and analysis; analyze and interpret budget data.
3. Perform long-range budget planning.
4. Organize, motivate and direct the activities of subordinates.
5. Work effective with officials and employees of the District, public agencies and the community.
6. Communicate effectively, both orally and in writing, with proper English usage, spelling, grammar, and punctuation.
7. Ensure compliance of fiscal policies and procedures with applicable statutes and regulations.
8. Present clear and concise management, finance, and related reports.

TRAINING AND EXPERIENCE:**Education:**

Bachelor's degree in Business Administration or related field desired.

Experience supplemented by college coursework in a related field is desired.

Experience:

Four years of increasingly responsible professional experience in business management, accounting and/or budget analysis.

Two years in a supervisory capacity in a related field is desired.

LICENSE AND CERTIFICATION:

Possession of an appropriate, valid driver's license.

Possession of an appropriate, valid California driver's license prior to the completion of the probationary period.

Ability to be covered under the District property/liability insurance.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE:	August 09, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	APPROVE AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANT FORM FOR NEW CLASSIFICATION - ASSISTANT DIRECTOR, FISCAL SERVICES	

BACKGROUND

A primary function of the Personnel Commission is to review job descriptions as well as determine the merit and fitness requirements for classified classifications. The Americans with Disabilities Act (ADA) suggests that physical/mental requirements for the performance of the essential functions for a particular classification be specified in recommended format.

STATUS

The physical/mental requirements for Assistant Director, Fiscal Services are presented for approval in the currently utilized ADA Compliant Job Analysis abbreviated format as attached.

RECOMMENDATION

It is recommended that the Personnel Commission approve the ADA Compliant Job Analysis as presented.

PALMDALE SCHOOL DISTRICT
ADA COMPLIANT JOB ANALYSIS

ASSISTANT DIRECTOR, FISCAL SERVICES

Frequency Key: The following abbreviations denote the frequency an activity is performed daily.

- N = Never
- I = Infrequently (less than once per day)
- O = Occasionally (less than 2 ½ hours per day)
- F = Frequently (2 ½ to 5 hours per day)
- C = Continuously (more than 5 hours per day)

PHYSICAL DEMANDS					
Postures/ Movements: During ESSENTIAL Functions					
Sitting	C	Kneeling	I-O	Twisting at Waist	O
Standing	O	Crawling	N	Reaching:	
Walking	O	Climbing*	I	Above Shoulders	I
Bending	I-O	Balancing*	I	At/Below Shoulders	F
Stooping	I	Foot Controls	N	Neck Extension (up)	F
Squatting	I	Pushing	I	Neck Flexion (down)	C
Lying Down	N	Pulling	I	Neck Rotation (turning)	C

Comments: **incumbents may use a stool or small step ladder to reach records stored above shoulders.

Lifting: During ESSENTIAL Functions					* Indicates with assistance
Weight - Pounds	Below Waist	Waist/ Chest	Above Shoulder	Examples of Objects Lifted	
Up to 10	O	O	I	Paperwork; standard office supplies; books, binders	
11-25	I	I	I	Paperwork, standard office supplies/equipment	
26-50	I	I	N	Case of copy paper, archive file boxes	
51-75*	N	N	N	n/a	
76-100*	N	N	N	n/a	
Over 100*	N	N	N	n/a	

Comments: * Overweight items require breaking down or assistance

Carrying: During ESSENTIAL Functions				* Indicates with assistance
Pounds	Freq.	Distance	Examples of Objects Carried	
Up to 10	O	Up to 100 ft.	Paperwork, files, office supplies, books, binders	
11-25	I	Up to 100 ft.	Standard office supplies/equipment	
26-50	I	Up to 25 ft.	Case of copy paper, archive file boxes	
51-75*	N	N	n/a	
76-100*	N	N	n/a	
Over 100*	N	N	n/a	

Comments: *Overweight items require breaking down or assistance

OBJECT MANIPULATION		
	Freq.	Tools & materials handled during ESSENTIAL Functions:
Fine/Simple Grasp	O-C	Standard office supplies/equipment; telephone receiver; paperwork; office supplies
Fine/Simple Manipulation	O-C	Telephone keypad; pens/pencils; paper; office supplies; use of computer mouse
Gross Manipulation	I	Moving files and boxes of files; lifting binders; loading paper into copiers; rearranging small office equipment.
Power/Tight Grasp	I	Moving file boxes; grasping larger references binders; carrying large files; loading paper into copier.

MENTAL AND PSYCHOLOGICAL DEMANDS		
UNDERSTAND AND FOLLOW DIRECTIONS - with little or no direction	Essential	Functions
Ability to understand written and oral instructions, and follow directions with little or no additional directive or supervision. Ability to ask simple questions or request assistance and identify when assistance is needed; ability to recognize potential hazards and follow appropriate precautions.	Yes	1-7, 9-16, 18, 19, 22, 23, 27
REGULAR AND RELIABLE ATTENDANCE		
Ability to perform activities within a schedule, maintain regular attendance and be punctual; ability to complete a normal work day and/or work week and perform at a consistent pace to meet productivity expectations.	Yes	1-15, 17, 18, 19, 21, 22, 23, 24, 27
ABILITY TO DEVELOP AND MAINTAIN POSITIVE WORK RELATIONSHIPS		
Ability to interact appropriately with others encountered in the course of work, including co-workers or peers; monitor and adjust personal behaviors to support positive work environment for company/organization; respond appropriately to evaluation or criticism.	Yes	1-7, 9-16; 18,19, 22, 23, 27
PROBLEM SOLVING		
Ability to set realistic goals or make plans independently of others; respond appropriately to changes in the work conditions; make independent decisions or judgments under general direction, based on appropriate information	Yes	1-7, 9-16; 18,19, 22, 23, 27
ABILITY TO PERFORM COMPLEX AND VARIED TASKS		
Ability to synthesize, coordinate and analyze data; ability to perform jobs requiring precise attainment of set limits, tolerances or standards; perform a variety of duties, often changing from one task to another of different nature without loss of efficiency or composure.	Yes	1-7, 9-16; 18,19, 22, 23, 27
SUPERVISE/LEAD AND INFLUENCE OTHERS		
Ability to negotiate with, instruct/supervise people; ability to convince or direct others; ability to perform work activities requiring negotiating with, explaining or persuading.	Yes	1, 2, 3, 7, 9, 11, 16, 17, 18, 19, 23, 27

MEMORY		
Ability to learn and remember work procedures; perform activities of a routine nature; understand and remember detailed instructions	Yes	1-7, 9-16; 18,19, 22, 23, 27

Comments:

COMMUNICATION / SENSORY DEMANDS				
Method	Freq.	Function #: ESSENTIAL	Freq.	Function #: Non-ESSENTIAL
Seeing	C	1-7, 9-16; 18,19, 22, 23, 27		
Hearing	C	1-7, 9-16; 18,19, 22, 23, 27		
Speaking	F-C	1-7; 9-16; 18,19, 22, 23, 27		
Reading	C	1-7; 9-16; 18,19, 22, 23, 27		
Writing	F-C	1-7; 9-16; 18,19, 22, 23, 27		
Math	F-C	1-7, 9, 12-15, 17,18, 19, 22, 23, 27		

Comments:

ENVIRONMENTAL CONDITIONS		
	Freq.	Example of Environment / Exposure
Indoors	C	Majority of workday is performed in cubicles and offices; visits to other District departments.
Outdoors	O	Walking to and from vehicle; visits to other District departments; attending off-site meetings and/or trainings; emergency drills; outdoor storage space.
Temperature Swings	I	Seasonal weather conditions when outdoors; climate-controlled offices and buildings.
Dust / Wind	I	Office dust; standard office supplies/equipment; exposure to seasonal weather conditions and wind when outdoors; old records in storage space.
Noise	O	Public/employee contact; standard office equipment; custodial equipment when offices are cleaned.
Vibration	I	Standard office equipment; pushing/pulling carts over flooring or door jams.
Fumes / Odors	I	Perfumes/colognes; food in workplace; cleaning/disinfecting agents.
Toxic Substances	N	n/a
Radiation	N	n/a
Mechanical Hazards	I	Malfunctioning office equipment
Electrical Hazards	I	Unplugging, plugging equipment
Explosive Hazards	N	n/a

Protective/Safety Equipment and Training/Attire:

Dress code in accordance with Board policy. Incumbents participate in all legally required trainings for position, as well as any elective or District-provided training as assigned. Hand sanitizer; first aid kits and fire extinguishers are readily available at work site.

OPERATION OF VEHICLES, EQUIPMENT OR MACHINERY			
Essential Functions	Freq.	Non-Essential Functions	Freq.
Calculators	C		
Standard office equipment	C		
Desktop/laptop computer	C		
District vehicle for school business	I		

WORK SETTING				
Brief Description of Work Site: Palmdale School District Office, Central Location				
Breaks: Two 15-minute rest breaks 30-minute lunch		Overtime: Exempt		
Supervised by: Fiscal Services Administrator		Supervises: Assigned staff		
Number of Employees at Work Site: Approximately 50				
Characteristics of Site:	%		%	
Informal	40	Formal	60	Formal + Informal = 100 %
Autonomy-oriented	75	Team-oriented	25	Autonomy + Team = 100%
Routine Tasks	50	Variable Tasks	50	Routine + Variable = 100 %
Slow Paced	50	Fast Paced	50	Slow + Fast Paced = 100%
Low Pressure	50	High Pressure	50	Low + High Pressure = 100%

JOB ANALYSIS PARTICIPANTS			
Name	Signature	Job Title	Date
Lisa Jehlicka		Fiscal Services Administrator	8/2/2023
Dr. Frances Ufondu		Chief Business Officer	8/2/2023
Mary Theus		Director, Personnel Commission	8/2/2023
Other Sources of Information: <input checked="" type="checkbox"/> Referral to company job description Interview <input checked="" type="checkbox"/> Other - Former ADA document			
Prepared by: <u>Mary Theus</u> Date: <u>08/02/2023</u>			

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE August 09, 2023 _____ REPORT

TO: Personnel Commission _____ X ACTION

FROM: Mary Theus
Director, Personnel Commission

RE: APPROVE NEW CLASS DESCRIPTION AND SALARY SCHEDULE PLACEMENT:
ASSISTANT DIRECTOR, PAYROLL/ACCOUNTING

BACKGROUND

The District requires a leadership position to provide additional administrative support for the efficient and effective management of the Payroll department.

STATUS

A job description titled Assistant Director, Payroll/Accounting, has been developed for consideration. This new leadership position will supervise the activities of the Payroll department under the general direction of the Fiscal Services Administrator. It will be placed in the Assistant Director category of the Leadership Team schedule, with salary range placement at \$78,060.00 to \$99,726.00 annually.

RECOMMENDATION

It is recommended that the Personnel Commission approve the new classification, job description, and salary schedule placement as presented.

ASSISTANT DIRECTOR, PAYROLL/ACCOUNTING

Bargaining Unit: Management

SALARY RANGE

\$78,060.00 - \$99,626.00 Annually

(Leadership Team Salary Schedule)

BASIC FUNCTION

Under the general direction of the Fiscal Services Administrator, lead and participate in planning, directing, and supervising the operations and activities of the Payroll department; perform payroll functions, oversee, and manage the processing, auditing, approval, maintenance, and completion of payroll and related fiscal transactions and records; supervise and evaluate the performance of assigned staff; perform related duties as assigned.

ESSENTIAL DUTIES/RESPONSIBILITIES

- Perform, plan, organize, and oversee the day-to-day operations of the payroll department to ensure the accurate and timely processing of the District's payroll and benefits in compliance with relevant laws, codes, rules, regulations, policies, and procedures.
- Oversee and supervise complex payroll, fund accounting, and revenue reconciliation; identify problems and implement solutions; and make recommendations for appropriate complex accounting and payroll-related actions.
- Analyze and prepare an array of financial statements, compliance and cash flow reports and communicate results of financial analyses to the Fiscal Services Administrator.
- Develop, recommend, and implement policies and procedures for payroll processing, timekeeping, and other related processes, with a focus on improving the overall effectiveness of customer service.
- Coordinate and participate in the preparation and processing of payroll and benefits; performs the most complex payroll and benefits calculations such as teacher class size overage and resolves complex issues and discrepancies.
- Ensures accuracy of absence and leave accounting and records for all employees; coordinates and may participate in the preparation and distribution of leave balance forms, records, and reports for employees.
- Calculate, reconcile, and submit monthly and quarterly federal and state taxes, fund contributions to social security, Medicare, and unemployment benefits, and ensures accurate reporting in compliance with established timelines; coordinate the submission of tax deposits.
- Serves as liaison with the Los Angeles County Office of Education and tax agencies regarding District taxes.
- Oversee, analyze, process, and verify balances on payroll accrual accounts and accounts payable and receivable related to payroll, insurance, and other benefits; reviews payroll ledgers and reconciles payroll account balances.
- Participates in the interview, selection, supervision, and evaluation of assigned payroll staff; confers with the Fiscal Services Administrator on employment and/or disciplinary actions as required.
- Plan, coordinate and arrange for appropriate training for assigned personnel; develop and initiate departmental activities, orientations, and in-services to review policies and procedures of the department, Palmdale School District, and changes to state and federal regulations.

- Computes salary reduction amounts per California Labor Law and IRS guidelines, and oversees and reviews processes for payroll collections.
- Interpret federal and state laws, codes, collective bargaining contracts, retirement system regulations, district procedures and policies related to payroll operations, and assure district compliance; monitor compliance to legislative changes and district contract revisions.
- Research, interpret, apply, and explain complex laws, codes, rules, regulations, policies, procedures, and collective bargaining agreements pertaining to the payroll function; identify legislative changes, analyze their impact on the District's payroll operations, and ensure compliance with such changes as well as District contract revisions.
- Serve as a technical resource for payroll functions, including advising administration and staff of changes to payroll laws, procedures and emerging payroll issues; research and respond to inquiries pertaining to payroll functions, transactions, practices, policies, and procedures.
- Collaborate with Human Resources staff, management, and other departments to analyze and resolve a variety of payroll issues; identify, and establish accurate account codes, establish guidelines for creating calendars and assignments, implement salary schedule changes, apply collective bargaining agreements and Personnel Commission Rules and Regulations, and other related issues.
- Supervises and participates in fiscal and calendar year-end closing procedures.
- Uses independent judgment and interpretive abilities, and identifies problems which require supervisory attention.
- Coordinate with the Los Angeles County Office of Education (LACOE) to maintain the integrated automated payroll system and serves as the District's primary payroll liaison with third parties, including CalSTRS and CalPERS retirement systems.
- Coordinate and assist in the preparation of employer information for court subpoenas; respond to and set up payroll adjustments for garnishments and other forms of salary reduction.
- Prepare, audit, and submit a variety of financial and statistical reports; oversee and participate in the maintenance and organization of payroll records, files, and reports.
- Participate in a variety of meetings, trainings, and workshops to maintain up-to-date knowledge and skills.
- Demonstrate behavior that reflects established professional responsibilities (i.e., attendance, punctuality, professional dress and verbal/nonverbal communication).
- Demonstrate knowledge of Board Policies and Administrative Regulations as they relate to the position.
- Assumes duties for financial functions in the absence of the Fiscal Services Administrator or as needed.
- Perform other related job duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

MINIMUM QUALIFICATIONS:

Knowledge of

1. Fundamental payroll procedures including state and federal guidelines and regulations;
2. Pertinent federal, state, county, county office of education, and other pertinent provisions regulating District payroll;
3. Applicable IRS and state tax reporting regulations;
4. Workers' compensation laws related to employee payroll;
5. Interpersonal skills using tact, patience, and courtesy;
6. Microsoft Office programs, including Word, Excel, PowerPoint;
7. Correct language usage, grammar, spelling, and punctuation;
8. Principles of supervision and training;
9. Public speaking techniques;
10. Budgeting practices regarding monitoring and control;

11. Office organization and general management practices;
12. Report preparation and record keeping.

Ability to

1. Learn district organization, operations, policies, regulations and procedures;
2. Read, interpret, apply, and explain laws, codes, rules, regulations, procedures pertaining to wages and benefits for public sector employees and bargaining unit contracts;
3. Establish and maintain cooperative and effective working relationships with district management, staff, external auditors, representatives of the Los Angeles County Office of Education, and others encountered in the course of work;
4. Maintain accurate and interrelated financial, payroll, and personnel records, including preparing; complex statistical information and reports;
5. Make mathematical calculations quickly and accurately;
6. Maintain the security of confidential materials;
7. Train others in the proper use of the time and attendance, and payroll software systems;
8. Analyze situations accurately and adopt an effective course of action;
9. Comprehend and follow directions given verbally and in writing;
10. Tolerate stress and maintain composure in the face of high workload, competing or conflicting demands; work within rules and policy;
11. Ability to work on several tasks with frequent interruptions;
12. Demonstrate mental acuity sufficient to perform the essential functions of the position;
13. Communicate effectively with staff both orally and in written communications;
14. Write effectively, with proper English usage, spelling, grammar, punctuation and stylistic proficiency;
15. Meet schedules and timelines, which may include working evenings, early mornings, and weekends as required;
16. Work independently under general direction;
17. Be motivated to produce high quality work product, including attending workshops and trainings outside of assigned working hours in those areas in which formal training is needed;
18. Maintain a work pace appropriate to the position in an office environment with frequent interruptions and changing priorities.

REQUIRED EDUCATION AND EXPERIENCE

Education

An Associate degree or higher from an accredited college or university is preferred, with major coursework in accounting, business administration, or a related field.

Experience

Minimum of four (4) years of experience preparing and processing general accounting entries in an automated system, including one year of experience training, leading, or supervising others, preferably in a district-level school setting.

Substitution: Up to two years of experience may be substituted for a Bachelor's or higher degree, with major coursework described.

LICENSE AND CERTIFICATION

Possession of an appropriate, valid California driver's license.

Ability to be covered under the District property/liability insurance.

WORKING CONDITIONS

Work Environment: Work is performed primarily in an Indoor office environment.

Physical Demands: Ability to sit for extended periods of time; some walking and standing; lifting, carrying, pushing and/or pulling, twisting at waist, bending, stooping squatting, and reaching; vision and hearing in normal range with or without correction, sufficient to read computer screen and printed documents, and listen to personnel and the public (telephone or in-person); dexterity of hands and fingers to operate standard office and computer equipment.

NOTE: Occasionally, the position requires the employee to work irregular or extended hours.

**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
AGENDA ITEM**

DATE:	August 09, 2023	REPORT
TO:	Personnel Commission	<u> X </u> ACTION
FROM:	Mary Theus Director, Personnel Commission	
RE:	APPROVE AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANT FORM FOR NEW CLASSIFICATION - ASSISTANT DIRECTOR, PAYROLL/ACCOUNTING	

BACKGROUND

A primary function of the Personnel Commission is to review job descriptions as well as determine the merit and fitness requirements for classified classifications. The Americans with Disabilities Act (ADA) suggests that physical/mental requirements for the performance of the essential functions for a particular classification be specified in recommended format.

STATUS

The physical/mental requirements for Assistant Director, Payroll/Accounting are presented for approval in the currently utilized ADA Compliant Job Analysis abbreviated format as attached.

RECOMMENDATION

It is recommended that the Personnel Commission approve the ADA Compliant Job Analysis as presented.

PALMDALE SCHOOL DISTRICT
ADA COMPLIANT JOB ANALYSIS

ASSISTANT DIRECTOR, PAYROLL / ACCOUNTING

Frequency Key: The following abbreviations denote the frequency an activity is performed daily.

N = Never
I = Infrequently (less than once per day)
O = Occasionally (less than 2 ½ hours per day)
F = Frequently (2 ½ to 5 hours per day)
C = Continuously (more than 5 hours per day)

PHYSICAL DEMANDS					
Postures/ Movements: During ESSENTIAL Functions					
Sitting	C	Kneeling	I-O	Twisting at Waist	O
Standing	O	Crawling	N	Reaching:	
Walking	O	Climbing*	I	Above Shoulders	I
Bending	I-O	Balancing*	I	At/Below Shoulders	F
Stooping	I	Foot Controls	N	Neck Extension (up)	F
Squatting	I	Pushing	I	Neck Flexion (down)	C
Lying Down	N	Pulling	I	Neck Rotation (turning)	C

Comments: *incumbents may use a stool or small step ladder to reach records stored above shoulders.

Lifting: During ESSENTIAL Functions					* Indicates with assistance
Weight - Pounds	Below Waist	Waist/ Chest	Above Shoulder	Examples of Objects Lifted	
Up to 10	O	O	I	Paperwork; standard office supplies; books, binders	
11-25	I	I	I	Paperwork, standard office supplies/equipment	
26-50	I	I	N	Case of copy paper, archive file boxes	
51-75*	N	N	N	n/a	
76-100*	N	N	N	n/a	
Over 100*	N	N	N	n/a	

Comments: * Overweight items require breaking down or assistance

Carrying: During ESSENTIAL Functions				* Indicates with assistance
Pounds	Freq.	Distance	Examples of Objects Carried	
Up to 10	O	Up to 100 ft.	Paperwork, files, office supplies, books, binders	
11-25	I	Up to 100 ft.	Standard office supplies/equipment	
26-50	I	Up to 25 ft.	Case of copy paper, archive file boxes	
51-75*	N	N	n/a	
76-100*	N	N	n/a	
Over 100*	N	N	n/a	

Comments: *Overweight items require breaking down or assistance

OBJECT MANIPULATION		
	Freq.	Tools & materials handled during ESSENTIAL Functions:
Fine/Simple Grasp	O-C	Standard office supplies/equipment; telephone receiver; paperwork; office supplies
Fine/Simple Manipulation	O-C	Telephone keypad; pens/pencils; paper; office supplies; use of computer mouse
Gross Manipulation	I	Moving files and boxes of files; lifting binders; loading paper into copiers; rearranging small office equipment.
Power/Tight Grasp	I	Moving file boxes; grasping larger references binders; carrying large files; loading paper into copier.

MENTAL AND PSYCHOLOGICAL DEMANDS		
UNDERSTAND AND FOLLOW DIRECTIONS - with little or no direction	Essential	Functions
Ability to understand written and oral instructions, and follow directions with little or no additional directive or supervision. Ability to ask simple questions or request assistance and identify when assistance is needed; ability to recognize potential hazards and follow appropriate precautions.	Yes	1-7, 9-12, 14-17, 20-21, 25
REGULAR AND RELIABLE ATTENDANCE		
Ability to perform activities within a schedule, maintain regular attendance and be punctual; ability to complete a normal work day and/or work week and perform at a consistent pace to meet productivity expectations.	Yes	1-12, 14-17, 19-22, 25
ABILITY TO DEVELOP AND MAINTAIN POSITIVE WORK RELATIONSHIPS		
Ability to interact appropriately with others encountered in the course of work, including co-workers or peers; monitor and adjust personal behaviors to support positive work environment for company/organization; respond appropriately to evaluation or criticism.	Yes	1-7, 9-12, 14-17, 20-21, 25
PROBLEM SOLVING		
Ability to set realistic goals or make plans independently of others; respond appropriately to changes in the work conditions; make independent decisions or judgments under general direction, based on appropriate information	Yes	1-7, 9-12, 14-17, 20-21, 25
ABILITY TO PERFORM COMPLEX AND VARIED TASKS		
Ability to synthesize, coordinate and analyze data; ability to perform jobs requiring precise attainment of set limits, tolerances or standards; perform a variety of duties, often changing from one task to another of different nature without loss of efficiency or composure.	Yes	1-7, 9-12, 14-17, 20-21, 25
SUPERVISE/LEAD AND INFLUENCE OTHERS		
Ability to negotiate with, instruct/supervise people; ability to convince or direct others; ability to perform work activities requiring negotiating with, explaining or persuading.	Yes	1, 2, 9, 11, 14, 15, 16, 17, 21, 25

MEMORY		
Ability to learn and remember work procedures; perform activities of a routine nature; understand and remember detailed instructions	Yes	1-7, 9-12, 14-17, 20-21, 25

Comments:

COMMUNICATION / SENSORY DEMANDS				
Method	Freq.	Function #: ESSENTIAL	Freq.	Function #: Non-ESSENTIAL
Seeing	C	1-7, 9-12, 14-17, 20-21, 25		
Hearing	C	1-7, 9-12, 14-17, 20-21, 25		
Speaking	F-C	1-7, 9-12, 14-17, 20-21, 25		
Reading	C	1-7, 9-12, 14-17, 20-21, 25		
Writing	F-C	1-7, 9-12, 14-17, 20-21, 25		
Math	F-C	1-9, 12, 15-17, 20-21, 25		

Comments:

ENVIRONMENTAL CONDITIONS		
	Freq.	Example of Environment / Exposure
Indoors	C	Majority of workday is performed in cubicles and offices; visits to other District departments.
Outdoors	O	Walking to and from vehicle; visits to other District departments; attending off-site meetings and/or trainings; emergency drills; outdoor storage space.
Temperature Swings	I	Seasonal weather conditions when outdoors; climate-controlled offices and buildings.
Dust / Wind	I	Office dust; standard office supplies/equipment; exposure to seasonal weather conditions and wind when outdoors; old records in storage space.
Noise	O	Public/employee contact; standard office equipment; custodial equipment when offices are cleaned.
Vibration	I	Standard office equipment; pushing/pulling carts over flooring or door jams.
Fumes / Odors	I	Perfumes/colognes; food in workplace; cleaning/disinfecting agents.
Toxic Substances	N	n/a
Radiation	N	n/a
Mechanical Hazards	I	Malfunctioning office equipment
Electrical Hazards	I	Unplugging, plugging equipment
Explosive Hazards	N	n/a

Protective/Safety Equipment and Training/Attire:

Dress code in accordance with Board policy. Incumbents participate in all legally required trainings for position, as well as any elective or District-provided training as assigned. Hand sanitizer; first aid kits and fire extinguishers are readily available at work site.

OPERATION OF VEHICLES, EQUIPMENT OR MACHINERY			
Essential Functions	Freq.	Non-Essential Functions	Freq.
Calculators	C		
Standard office equipment	C		
Desktop/laptop computer	C		
District vehicle for school business	I		

WORK SETTING				
Brief Description of Work Site: Palmdale School District Office, Central Location				
Breaks: Two 15-minute rest breaks 30-minute lunch		Overtime: Exempt		
Supervised by: Fiscal Services Administrator		Supervises: Assigned staff		
Number of Employees at Work Site: Approximately 50				
Characteristics of Site:	%		%	
Informal	40	Formal	60	Formal + Informal = 100 %
Autonomy-oriented	75	Team-oriented	25	Autonomy + Team = 100%
Routine Tasks	50	Variable Tasks	50	Routine + Variable = 100 %
Slow Paced	50	Fast Paced	50	Slow + Fast Paced = 100%
Low Pressure	50	High Pressure	50	Low + High Pressure = 100%

JOB ANALYSIS PARTICIPANTS			
Name	Signature	Job Title	Date
Lisa Jehlicka		Fiscal Services Administrator	8/2/2023
Dr. Frances Ufondu		Chief Business Officer	8/2/2023
Mary Theus		Director, Personnel Commission	8/2/2023
Other Sources of Information: <input checked="" type="checkbox"/> Referral to company job description Interview <input checked="" type="checkbox"/> Other - Former ADA document			
Prepared by: <u>Mary Theus</u> Date: <u>08/02/2023</u>			