

**INTER-OFFICE CORRESPONDENCE  
LOS ANGELES UNIFIED SCHOOL DISTRICT  
OFFICE OF STAFF RELATIONS**

**TO:** Principals and Administrators  
**FROM:** Gifty J. Beets  
Assistant Chief Human Resources Officer

**DATE:** April 2022

**SUBJECT: APRIL 2022 STAFF RELATIONS UPDATES AND REMINDERS**

For additional resources and information, please visit our website at: <http://achieve.lausd.net/staffrelations>

**IMPORTANT DATES:**

- April 8, 2022** Recommended deadline for Growth Plan Visit for A-Basis Employees.  
**April 18, 2022** Recommended date for the Posting of 2022 – 2023 Tentative Matrix.  
**May 13, 2022** Displacement Notices due to HR  
**May 20, 2022** Contractual deadline for Teacher Notification of Tentative Assignment for 2022-2023 SY

**UPCOMING EVALUATION DATES:**

- May 10, 2022** Evaluation Issuance deadline for **Assistant Principals\***  
**May 11, 2022** Evaluation Issuance deadline for **Single Track** UTLA Represented Employees  
**May 17, 2022** Evaluation Issuance deadline for **Principals\***  
**May 18, 2022** Evaluation Issuance deadline for B-Basis Single Track Employees  
**May 24, 2022** Evaluation Issuance Deadline for **Directors** and **Community of Schools Administrators\***

**CERTIFICATED INFORMATION:**

- VIRTUAL ACADEMY UPDATES:** Employees currently working at City of Angels Virtual Academies received notice advising them of their options for next school year:  
Employees who wish to remain virtual and work at the Thematic Virtual Academies next school year must have indicated interest by March 15, 2022. Per the September 21, 2021 sideletter between UTLA and the District, these employees will not have return rights in the 2023-2024 school year.  
**Employees who want to return in-person** at their originally assigned school site (for 2021-2022) must have indicated interest of their wish to participate in the matrix process in writing and must have received their first vaccine dose by March 15, 2022. **A second dose must be uploaded by April 15, 2022 in order to receive a tentative assignment for the 2022-2023 school year.**
- WARNING OF POSSIBLE BELOW STANDARD EVALUATION (MID YEAR WARNING):** Employees who might receive an overall Below Standard Evaluation (BSE) should be given sufficient advance notice. Administrators are not only to provide written recommendations and assistance for improvement through written conference memos but should also include a warning as to the consequences of failure to improve. Such notice is to be given with sufficient time for the employee to implement the assistance provided. See **Attachment #1**, Administrative Task Calendar, and remember to **contact your Staff Relations Field Director if you are working with a teacher who may receive a BSE.**

### **3. BELOW STANDARD EVALUATIONS**

“When a Final Evaluation Report is marked "Below Standard," the evaluator shall specifically describe in writing the area(s) of below standard performance, together with recommendations for improvement, and the assistance given and to be given.” **(Article X, Section 6.0)** The written description is known as the BSE Attachment. Your Staff Relations Field Director will provide you with a template. The completed document is attached to the evaluation and uploaded to the EGDC platform. If you plan to issue a BSE, notify the person in writing at least five days prior to the scheduled meeting and inform them of their right to have a representation at the meeting.

### **4. TENTATIVE MATRIX PROCESS – SPRING 2022**

Before initiating the Matrix process for the 2022-2023 school year, school sites should finalize their budgets and Single Plans for Student Achievement (SPSA) with input from the appropriate councils. Finalize Coordinator/Coach/Dean Confirmation/Elections before matrix and preference forms are distributed. Distribute matrix and preference forms via email no later than April 18, 2022 (approximately four weeks prior to posting tentative assignment on May 20, 2022). All iterations of your matrix should be labeled "TENTATIVE" as changes in enrollment, etc., may result in changes to your matrix. Assign and post Tentative Teacher Assignments no later than May 20, 2022 (21 calendar days before the end of the school year). See **Attachment #2** for additional information.

### **5. DISPLACEMENT OF TEACHERS**

An over-taught condition exists when there are more qualified teachers than positions at a school or within a program or subject field at a school, or when a program or subject field is reduced, eliminated or moved from a school. Consult with your Staff Relations Field Director prior to displacing any employee. See **Attachment #3**, Displacement Reference Form.

### **6. TRANSITIONAL KINDERGARTEN (TK) TEACHER SELECTION**

*SB876 requires transitional kindergarten (TK) teachers to meet one of the additional requirements below:*

- a. At least 24 units in early childhood education, or childhood development, or both;*
- b. Professional experience in a classroom setting with preschool age children comparable to the 24 units described above;*
- c. A child development teacher permit issued by the Commission on Teacher Credentialing (CTC).*

*Current credentialed teachers who taught TK or TK/K combination classes for 75% or more of any academic school year on or before July 1, 2015, can teach without the added additional requirements.*

Teachers requesting TK must meet SB876 requirements above and indicate on their preference form that they meet these qualifications. Permanent teachers who meet the requirements shall be allowed to make their request before the site administrator assigns a non-permanent teacher. The only exception shall occur when the site administrator reasonably determines that any specific assignment is not in the best interests of the program. Contact your Staff Relations Field Director in these instances prior to making an assignment.

### **7. DISPUTE RESOLUTION PROCEDURE FOR GRADE (ELEMENTARY) AND CLASS (SECONDARY) ASSIGNMENTS FOR PERMANENT TEACHERS**

If differences arise as the result of the site administrator’s assignments of permanent teachers to grade (elementary) or class (secondary), the determination whether the assignment was inappropriate should be handled under the procedures of **Article V-A** (Alternate Grievance Procedure). If the matter needs to be submitted to an Alternate Grievance Panel, contact your Staff Relations Field Director who will provide you with the appropriate form(s) **(Article IX-A, Section 2(e) and (f))**.

## **8. HALF-TIME LEAVE REQUESTS**

Teachers on half-time leaves must work half of each working day. Exceptions and variations on the “half of each working day” requirement for half-time leaves must have the recommendation of the immediate administrator and the approval of the Local District Superintendent. Teachers must submit half time leave applications to the Human Resources Personnel Specialist by April 15, 2022 (Article XII, Section 21.0).

**9. SUBSTITUTE FOLDERS:** Make sure that you have a substitute folder, or equivalent, for each of your teachers. The school is required to provide substitutes with the essential information needed to perform the duties of the position. Include student attendance information, lesson plans, class rosters, seating chart(s), a map of the school, appropriate keys and security/emergency information (including how to use the class phone and how to contact the office in case of an emergency). **(Article XIX, Section 10.0)** It is recommended that you include the name of the school site UTLA Chapter Chair in the substitute folder since you are required to notify the substitute of his/her right to representation should you need to issue an Inadequate Service Report (ISR).

**10. LETTERS OF RECOMMENDATION:** If you receive a request for a letter of recommendation or a letter of reference, be sure to review **BUL-6495.0 – Responding to Requests for Letters of Recommendation** before proceeding with this request. You may choose to complete information requested for a letter of reference, but you are not required to do so. You can simply provide dates of employment, position, and salary information (i.e., a neutral letter of reference), or if you choose to write a more detailed letter of reference ensure that 1) you make it clear that you are doing so as an individual and not as a representative of the District or 2) you obtain the express permission of the head of your division to use District and School Letterhead for an official letter of recommendation or letter of reference **(Refer to BUL-6495.0, Responding to Requests for Letters of Recommendation)**.

### **Reminders:**

- Avoid “off-the-record” telephone conversations with prospective employers regarding a person’s performance. There is no such thing as “off-the-record.”
- Provide accurate factual information, based upon personal knowledge/observation of the person through direct contact with the person or obtained from the employee’s personnel record. Providing inaccurate information may expose you to risk of liability and/or jeopardize your credential(s).
- Do not make any misrepresentations of fact in describing the performance, qualifications and/or character of the applicant. You should not provide “half-truths.” For example, if you only provide positive aspects and completely ignore the negative aspects, you may give an inaccurate impression. This may subject you to potential discipline by the District, and/or individual liability for harm arising from the statement(s).
- If you make subjective statements or give opinions because they are requested, clearly identify them as opinions and not as fact. If you give an opinion, explain the incident or circumstances upon which you base the opinion.

## **11. PEER ASSISTANCE AND REVIEW (PAR)**

Although formal evaluations were suspended for permanent teachers for the 2021-2022 school year, all teachers can enroll in the Component 3 (C3) volunteer program and receive one-on-one support from PAR consulting teachers in addition to attending any of the two-dozen workshops that are currently being offered virtually. Please contact Christopher Ikeanyi, Coordinator, Peer Assistance and Review, at cikea1@lausd.net if you have any questions.

**12. CERTIFICATED DAY-TO-DAY SUBSTITUTE INADEQUATE SERVICE REPORT (ISR):** Before issuing an ISR, **always confirm whether a substitute is a contract pool teacher or a day-to-day substitute.** If the substitute is a day-to-day employee, the site administrator may, for cause, issue an Inadequate Service Report (ISR). Such a notice shall, absent compelling circumstances, be issued within ten working days after the date(s) of service, with a copy to the employee (either in person or by certified mail to the employee's address of record). Prior to the issuance of such a notice, the site administrator shall make a reasonable effort to contact and confer with the substitute regarding the allegations and of the substitute's right to a meeting, ***informing the employee that s/he has the right to have representation during that meeting.*** Upon employee request, a meeting will be held to discuss the matter. **The employee may be accompanied by a UTLA representative or a person of the employee's choice, as long as that person is not a member of another bargaining unit.** The timeliness of the employee's request for a meeting, or the non-availability of the employee or representative shall not delay issuance of the Inadequate Service Report beyond the ten working days after the date(s) of service. For substitutes that provide exemplary service, there is a **form available on the Human Resources Website that may be used to document their exemplary service (Article X, Section 7.0).**

**13. ACCESS AND RESPONSE TO CRITICAL MATERIAL IN PERSONNEL FILE – TEACHERS:** When the District receives a letter or other written material from a member of the public critical of a teacher's performance or character, the matter shall first be investigated. Except under compelling circumstances, the UTLA represented employee shall be given a copy within thirty (30) days of the District's receipt of the document. The document shall neither be placed in the personnel file nor retained by the District unless it is reasonably determined that the allegations have some substance or plausibility. If the document is either retained or placed in the employee's personnel file, the employee shall be given a reasonable opportunity to attach a reply. If the document came from within District personnel, an investigation may not be necessary or appropriate but all the aforementioned protections, including the notice to the employee shall be applicable **(LAUSD/UTLA CBA, Article X, Section 9.0)**.

**14. CHAPTER CHAIR ANNOUNCEMENTS AT FACULTY MEETINGS:** The Chapter Chair shall have the right to propose agenda items and make appropriate brief announcements within the first 45 minutes of faculty meetings or at least 15 minutes prior to the end of the meeting if such meeting is less than an hour in length **(LAUSD/UTLA CBA, Article IV, Section 8.0-i)**. Please make sure that UTLA announcements are included in the faculty meeting agenda, not in the professional development agenda which should be separate with a separate sign-in.

**CLASSIFIED INFORMATION:**

- 1. CLASSIFIED PERSONNEL PERFORMANCE:** Classified employees should receive documented assistance (minimally a conference memo) advising of the specific deficiencies prior to receiving a performance evaluation with ratings lower than "meets standards" and be provided a reasonable opportunity to improve. Please review timecards for attendance and obtain feedback regarding employee performance now. This will assist you in documenting problem areas for employees so that you may provide the necessary assistance and guidance. Providing a mid-year evaluation provides employees the opportunity to improve their performance or to acknowledge high performance. Please contact your Senior Human Resources Representative for assistance. **Suggested deadline for Conference Memos prior to annual evaluation: March 25, 2022.**

- 2. ACCESSING THE CLASSIFIED STAFF EVALUATION SYSTEM:** Video tutorials and job aids for the Evaluation System are posted online <https://achieve.lausd.net/Page/11130>. As a reminder, performance evaluations must be done no later than the second month and the fourth month during probation. Supervisors should go to the [Evaluation portal](#) to complete evaluations as needed. If there are performance/conduct issues, please contact your HR Representative immediately. The annual performance evaluations for single track C-Basis employees are due by May 12, 2022.

Due dates for annual performance evaluations of permanent employees are listed on **Attachment #4. Note:** there are no waivers of evaluations for the 2021-2022 school year. Failure to meet specified timelines may invalidate an evaluation.

- 3. RECOGNITION OF OUTSTANDING PERFORMANCE:** Employees who have either provided service or an act that was above and beyond the job expectations can be recognized by using the Notice of Outstanding Work Performance (PC Form 8254). Recognition can be given when the event/action occurs or during the performance evaluation. The form can be found on the Personnel Commission website, PC Forms: <https://achieve.lausd.net/Page/17701>
- 4. MyPLN TRAINING RESOURCE:** District employees have access to many training courses online courtesy of Organizational Excellence. Employees may access the training at MyPLN (<https://achieve.lausd.net/mypln#spn-content>). This online service is available to all of your Classified employees and can assist you in providing assistance and guidance, support and skill enhancement for your employees. Employees are also encouraged to visit the site on their own.
- 5. VACATION:** Effective July 1, 2022, all vacation earning employees will cease to accrue vacation once they reach their vacation cap. Management and use of vacation hours now will help to prevent employees from ceasing to accrue vacation after July 1, 2022. Please check your employee's vacation balances for the 2021-2022 school year by using the ZTMRVACBAL report in BTS. The job aid for this report can be found here: <https://achieve.lausd.net/Page/14219>. Select the "Vacation Balance Report"

#### **GENERAL INFORMATION:**

- 1. COVID-RELATED TIME REPORTING:** The Supplemental Paid Sick Leave Act (SPSLA) was signed into law by the Governor on February 9, 2022 and is retroactive to January 1, 2022. This law allows employees who are unable to work or telework due to specified reasons listed in the law to utilize SPSLA. Please see bulletin distributed by Risk Management for more information.
- 2. ANTHEM EMPLOYEE ASSISTANCE PROGRAM:** Employees may access the Anthem Employee Assistance Program (EAP) by calling (800) 999-7222 or visit <http://www.anthemead.com> and enter the code: LAUSD. This short-term support is available to all employees and family members, including part-time employees who are not eligible for District-paid benefits. Retirees are not eligible for EAP, as they are no longer employees. Please refer to **Attachment #5**, Employee Assistance Program Service Summary for Los Angeles Unified School District, which is also available by clicking [here](#).
- 3. EXTENDED LEAVES OF ABSENCE (INCLUDING WORKERS' COMPENSATION OR ILLNESS)** It is the responsibility of the school site administrator to follow up on all leaves. FMLA forms should be sent for absences after the third workday or if the employee is hospitalized. Administrators should contact the Claims Adjuster at Sedgwick to stay apprised of employee's workers' compensation claims, work status and return to work date. For questions or assistance regarding an employee's workers' compensation claim, or return to work procedures, contact the Integrated Disability Management office at (213) 241-

3138.

4. **CONTACTS FROM OUTSIDE ATTORNEYS:** Whenever you receive a phone call or any written correspondence from any outside attorney representing a District employee at your site, DO NOT RESPOND. Please call the Office of General Counsel for assistance with the matter at (213) 241-7600.
  
  5. **VACCINE DISMISSALS:** All employees working onsite must be vaccinated. Please ensure that any employees returning from a leave of absence (or returning from a City Of Angels assignment) are fully vaccinated before physically returning to work. Employees that elect not to get vaccinated after returning from a leave will be dismissed from District service at an upcoming Board meeting. Please ensure that unvaccinated employees that are not on a leave or do not have a reasonable accommodation are reported UPVX until dismissal action is taken. For questions about an employee’s disciplinary process related to the vaccine process, please contact [vaccinecompliance@lausd.net](mailto:vaccinecompliance@lausd.net).
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**OFFICE OF STAFF RELATIONS DIRECTORY**  
**FIELD DIRECTOR and SENIOR HR REPRESENTATIVE**  
**ASSIGNMENTS Tel: (213) 241-6056 Fax: (213) 241-8405**  
**BEAUDRY**

Title	Name	Extension	Email
Assistant Chief Human Resources Officer	BEETS, GIFTY	213-241-6056 213-241-5313	<a href="mailto:gifty.beets@lausd.net">gifty.beets@lausd.net</a>
Administrator-AALA	MARTINEZ, ISAIAS	213-241-8233	<a href="mailto:isaias.martinez@lausd.net">isaias.martinez@lausd.net</a>
Staff Relations Manager	GOSSETT, LORRI	213-241-6864 w 323-489-8469 c	<a href="mailto:lorri.gossett@lausd.net">lorri.gossett@lausd.net</a>
Field Director	HAYNES, ERIN	818-746-3662	<a href="mailto:edh0788@lausd.net">edh0788@lausd.net</a>
Administrative Secretary	SANCHEZ, LETICIA	213-241-8109	<a href="mailto:leticia.sanchez@lausd.net">leticia.sanchez@lausd.net</a>
Senior Office Technician	ZUNIGA, ADRIANA	213-241-8239	<a href="mailto:adriana.x.zuniga@lausd.net">adriana.x.zuniga@lausd.net</a>

**LOCAL DISTRICT NORTHWEST**

Field Director	DELISLE, CARRIE	818-654-3619	<a href="mailto:carrie.delisle@lausd.net">carrie.delisle@lausd.net</a>
Field Director	MARTINEZ, ADAN (.5 FTE)	818-654-3641	<a href="mailto:adan.martinez@lausd.net">adan.martinez@lausd.net</a>
Senior HR Rep	DAVTYAN, ZHANNA	818-943-8973	<a href="mailto:zhanna.davtyan@lausd.net">zhanna.davtyan@lausd.net</a>

**LOCAL DISTRICT NORTHEAST**

Field Director	BUTLER, MARIA	818-252-5435	<a href="mailto:murbin2@lausd.net">murbin2@lausd.net</a>
Field Director	MARTINEZ, ADAN (.5 FTE)	818-252-5436	<a href="mailto:adan.martinez@lausd.net">adan.martinez@lausd.net</a>
Senior HR Rep	NUNNALLY, KRISHNA	213-241-8242	<a href="mailto:krishna.nunnally@lausd.net">krishna.nunnally@lausd.net</a>

**LOCAL DISTRICT CENTRAL**

Field Director	ALFAYATE, JUAN	213-766-7345	<a href="mailto:jalfayat@lausd.net">jalfayat@lausd.net</a>
Field Director	GONZALEZ, CARLOS (.5 FTE)	213-766-7347	<a href="mailto:cvg0564@lausd.net">cvg0564@lausd.net</a>
Senior HR Rep	VACANT	213-241-6864	<a href="mailto:lorri.gossett@lausd.net">lorri.gossett@lausd.net</a>

**LOCAL DISTRICT EAST**

Field Director	CUEVAS, SUSANA	323-224-3353	<a href="mailto:scontr6@lausd.net">scontr6@lausd.net</a>
Field Director	GONZALEZ, CARLOS (.5 FTE)	323-224-3119	<a href="mailto:cvg0564@lausd.net">cvg0564@lausd.net</a>
Senior HR Rep	VACANT	213-241-6056*	<a href="#">See below</a>

**LOCAL DISTRICT SOUTH**

Field Director	LENON, DAMIAN	310-354-3472	<a href="mailto:dlenon@lausd.net">dlenon@lausd.net</a>
Field Director	STEVENS, JEANETTE	310-354-3419	<a href="mailto:jls6008@lausd.net">jls6008@lausd.net</a>
Senior HR Rep	MONTGOMERY, EBONY	213-241-8248	<a href="mailto:ebony.montgomery@lausd.net">ebony.montgomery@lausd.net</a>

**LOCAL DISTRICT WEST**

Field Director	MOSCOSO, VERONICA	310-914-2153	<a href="mailto:vxm6767@lausd.net">vxm6767@lausd.net</a>
Field Director	VACANT	-	-
Senior HR Rep	VACANT	818-943-8973	<a href="mailto:zhanna.davtyan@lausd.net">zhanna.davtyan@lausd.net</a>

**DIVISION OF ADULT & CAREER EDUCATION**

Field Director	DR. FOOTE, JACK	818-927-1353	<a href="mailto:djf2378@lausd.net">djf2378@lausd.net</a>
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**VACCINE COMPLIANCE**

Division HR Administrator	WAUGH, LAKEISHA		<a href="mailto:lakeisha.waugh@lausd.net">lakeisha.waugh@lausd.net</a>
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\* Bell/Cudahy/Maywood, Boyle Heights, East LA – Contact Krishna Nunnally (NE)

\* Hunt. Park/Vernon/Walnut Park, Lincoln Heights/El Sereno, South Gate – Contact Ebony Montgomery (S)

**STAFF RELATIONS**  
**ADMINISTRATIVE TASK CALENDAR FOR CERTIFICATED EVALUATIONS**  
**2021-2022**

**AALA REPRESENTED EMPLOYEES**

	I Distribute Initial Planning Sheet on (recommended)	II Return Initial Planning Sheet by (contractual)	III Initial Planning Conference by (contractual)	IV** Evaluations Issuance Deadline (contractual)
Basis A	07/01/21	08/06/21	08/20/21	05/10/2022 – Assistant Principals
Basis E	07/21/21	08/27/21	09/10/21	05/17/2022 – Principals
Basis B	07/30/21	09/10/21	09/24/21	05/24/2022 – Principal Supervisors
				05/10/2022 – All Others

**\*\*\*See the notation below for administrators evaluated on the EDSSL and EDSPS platforms currently serving in the capacity of Assistant Principal, Principal, Director or Community of Schools Administrator.**

**UTLA REPRESENTED EMPLOYEES**

	I* Notification of Evaluation no later than (contractual)	II Submit Initial Planning Sheet by (recommended)	III + Establishment of Objectives Conference by (contractual)	IV ++ Formal Observation Deadline (contractual)	V** Evaluations Issuance Deadline (contractual)
A Basis	07/30/21	08/06/21	08/20/21	02/11/22	05/31/22
Single Track	09/17/21	09/24/21	10/08/21	02/18/22	05/11/22
B-Basis Single-Track Calendar	09/27/21	09/02/21	09/17/21	02/18/22	05/18/22
B Basis Option 4	08/06/21	08/13/21	08/27/21	02/18/22	05/16/22
B Basis Option 6	08/20/21	08/27/21	09/10/21	02/17/22	05/18/22
B Basis Option 7	08/13/21	08/20/21	09/02/21	02/17/22	05/31/22
B Basis Special Calendar GB_06SPE	08/13/21	08/20/21	09/02/21	02/18/22	05/31/22
	I* Notification of Evaluation	II Submit Initial Planning Sheet	III + Establishment of Objectives	IV ++	V** Evaluations Issuance



	<b>no later than (contractual)</b>	<b>by (recommended)</b>	<b>Conference by (contractual)</b>	<b>Formal Observation Deadline (contractual)</b>	<b>Deadline (contractual)</b>
<b>B Basis Special Calendar GB_08SPE</b>	<b>08/13/21</b>	<b>08/20/21</b>	<b>09/02/21</b>	<b>02/18/22</b>	<b>05/31/22</b>

**\* For UTLA-represented employees, notification that they are to be evaluated should be given as soon as possible, but NO LATER than the fall norm day or the last day of the fifth week of school, whichever is earlier. The only exception is for teachers assigned within the ten (10) days preceding norm day, up to the last workday of the eighth week of school, in which case, the notification of evaluation must be given within ten workdays of the employee reporting to the school. Employees that report later than the last workday of the eighth week of the fall term, shall not be subject to evaluation that year, unless they are non-permanent, or they received a below-standard evaluation in the previous academic year.**

**+ For UTLA-Represented Employees, the Establishment of Objectives must be completed by the last workday of the eighth week. For employees newly assigned within ten workdays prior to Norm Day, the objectives must be established no later than the last workday of the 12<sup>th</sup> week of the academic year.**

**++ For UTLA-Represented Employees, one required, formal observation must be completed by the last workday of the sixth week of the second semester. Within ten (10) days following the formal observation, a post-observation must be held to discuss the observation in terms of the goals established in the initial planning process.**

**\*\* For UTLA-Represented Employees, the Final Evaluation Report must be issued no later than this date (30 calendar days prior to the employee’s last regularly scheduled school day – Article X, Section 6.0)**

**2022-2023 Elementary/Secondary Staffing  
RECOMMENDED TIME SEQUENCE**

<b>TASKS</b>	<b>SINGLE TRACK CALENDAR</b>
I. (a) +*Decision: Coordinator Position(s) in your School Plan  (b) Selection of Coordinator(s) Election of Dean(s)	Months of March and April or prior to posting of Matrix (see III. below).
II. ** Election of Chapter Chair	Month of April
III. (a) +***Post Matrix:  Teachers Request Track, Grade level (elementary only), Department	Approximately four weeks prior to selection  (Recommended date: <b>April 18, 2022</b> )
IV. Contractual Date for Teacher Notification of Tentative Assignment	As soon as feasible, but no later than <b>May 20, 2022</b>

+ Principal and UTLA Chapter Chair may jointly develop alternative dates

\* Refer to Article IX-A, Sections 4.0-9.0

\*\* Chapter Chair elections are to be conducted by UTLA. Any dispute should be referred directly to UTLA.

\*\*\* Refer to Article IX-A. Matrix must be posted approximately four weeks prior to the day teachers on any track or schedule finish service for the school year or four weeks prior to requesting classes.

@ “In order to provide adequate planning time, teachers shall be notified of tentative assignments as soon as feasible, but not later than twenty-one (21) calendar days prior to the last scheduled workday.” (Article IX-A, Section 2.0(a))

A separate vote should be held to authorize a current Coordinator and Dean who has been out of the classroom for 5 years to remain out of the classroom for five additional years. This procedure needs to be completed before the selection/confirmation or election process.

**STRATEGIC ASSIGNMENT OF TEACHERS TO MEET STUDENT INSTRUCTIONAL NEEDS**

This information is intended to provide guidance to Principals so that they can comply with the LAUSD/UTLA Collective Bargaining Agreement and assure that teacher assignments best meet students' instructional needs and priorities.

**Elementary School Assignments**

1. In elementary schools, the LAUSD/UTLA Collective Bargaining Agreement (**CBA**) Article IX-A, Section 2.0 c (1) (ii) provides that the site administrator shall assign permanent teachers who are otherwise qualified to the **grade level** opening on the basis of District seniority.
2. The Collective Bargaining Agreement does not provide teachers the right to select specific instructional programs, student performance levels or instructional clustering of students. Article IX-A, Section 2.0 c (1)(ii)
3. Principals can use preference forms (District's preferred method that will support an effective instructional program) or locally determined method to receive teachers' requests for assignments. Article IX-A, Section 2.0 b
4. The site administrator **can and should make exceptions to the CBA seniority provision** if he or she reasonably determines that the specific assignment is not in the best interest of the educational program. Article IX-A, Section 2.0 c (1)(ii)
5. Teachers with the specified credentials and required qualifications ("qualified") may request assignment to their grade level using a teacher preference form or other locally determined method. Submission of this form shall serve as a request for the assignment. Article IX-A, Section 2.0 b
6. Administrators should review credentials, specific training, authorizations, performance indicators (i.e. pre/post assessment data, EL reclassification data, DIBELS) teacher status (Probationary 1 and 2) and evaluation/conduct records to inform their decision to assign a teacher to a specific class.

**Secondary School Assignments and Special Education**

1. In secondary schools, Article IX-A, Section 2.0 d only provides teachers the right to a **department** on the basis of recent experience/seniority. However, Article IX-A, Section 2.0 b states that "teachers with specified credentials and required qualifications may request assignment to specific class(es) within their department."
2. **Principals retain the authority** to assign teachers to particular classes and sections within a department.
3. Secondary principals must understand that the CBA does not confer the right for teachers to select either classes or "lines" on the master schedule.
4. Principals should take in consideration the best interest of the instructional program including specific training, authorizations, performance indicators (i.e. core subject end of the year assessments data, EL reclassification data, pre/post assessment data) teacher status (Probationary 1 and 2) and evaluation/conduct records to inform their decision to assign a teacher to a specific class.
5. Principals **can and should use objective data** as described above to assign teachers to classes.
6. Classes within a department shall be distributed by the Principal (or designee) in consultation with the **elected department chair**.

**Please contact your Staff Relations Field Director should you have specific questions.**

## Tentative Matrix Process – Spring 2022

Before beginning the Matrix process for the 2022-2023 school year, school sites should finalize their budgets and Single Plans for Student Achievement (SPSA) with input from the appropriate councils.

### Critical Dates for Matrix Development (pending potential negotiations):

- Posting of Matrix and preference forms should be sent via email no later than **April 18, 2022**.
- Tentative Assignments should be posted by **May 20, 2022**.

### Next Steps (Outline)

- 1) Distribute matrix and preference forms via email no later than April 18, 2022 (approximately four weeks prior to posting tentative assignment on May 20, 2022.) Approximately four weeks prior to the day teachers on any track or schedule finish service for the school year or four weeks before classes are selected, the site administrator shall prepare and post a matrix indicating the tentative number of classes for each subject/grade level (**Article IX-A, Section 2.0 (a)**).
- 2) Fly the position (if budget process is completed and/or the position has been approved).
- 3) Principal and UTLA Chapter Chair collaborate in order to hold vote for 5-year out of classroom coordinators/coaches (as appropriate).
- 4) New coordinator positions - Receive letters of interest from potential eligible candidates (**Article IX-A, Section 5.1**).

## Coordinator/Coach/Dean Process

### Contractual Provisions

### Considerations/Guidance:

Principals shall collaborate with their UTLA Chapter Chairs to complete the following:

- 1) Determine whether there will be Coordinator(s)/Coach(es) at the school site. For categorically funded coordinator positions, the determination as to whether or not there shall be such a position is to be made by appropriate statutory site councils (**Article IX-A, Section 4.0 (c)**).
- 2) Determine whether or not a Dean(s) position(s) will be established at the school. With respect to regular program dean positions, determination as to whether there shall be such a position shall be made by the school site administrator (**Article IX-A, Sections 4.0 (b) and 7.0**).
- 3) Determine whether 5-Year Out-of-Classroom Assignment Limitations need to be addressed. *Employees who wish to extend their out of classroom assignment beyond the five-year limit must declare their desire to continue and a qualifying secret ballot election will be held to determine their eligibility to become a candidate. If the incumbent receives the approval of 2/3 of the employees voting, the incumbent will qualify to become a candidate to fill an out-of-classroom position (**Article IX-A, Section 9.0 (b)**).* If necessary, hold the vote (via Google Forms\*, Survey Monkey, etc.).
- 4) These matrix and preference forms should be sent via email no later than April 18, 2022 (four weeks prior to posting tentative assignments on May 20, 2022). At this time, be sure to establish a due date for the submission of preference forms.
- 5) Finalize Coordinator/Coach/Dean Confirmation/Elections before matrix and preference forms are distributed.
- 6) Collect preference forms (allow time between the posting of the matrix and distribution of preferences forms and the selection date).
- 7) Establish an agreed upon method for the selection process. Hold conferences via Zoom, Microsoft Teams, or Conference to meet with teachers (Elementary), or by department to assign classes in collaboration with Department Chair (Secondary). Establish timelines and notify teachers of the anticipated meeting time(s). Ensure that teachers who are on leave or reassigned are notified of the process as well as of the date of the selection process (allow selection by proxy if a teacher is not available). The use of the Cattle Call method for assignments is strongly discouraged.
- 8) Elementary assignments are made pursuant to **Article IX-A, Section 2.0 (c, 1, 2, 3)**.
- 9) Secondary assignments are made pursuant to **Article IX-A, Section 2.0 (d, 1, 2, 3, 4)**.

- 10) Assign and post Tentative Teacher Assignments no later than May 20, 2022 (21 calendar days before end of the school year (**Article IX-A, Section 2.0 (a)**)).

**Coordinator/Coach/Dean Confirmation/Election process:**

- 1) First year coordinator assignments are for a one-year term and incumbent coordinators may submit their name for reconfirmation the following year. Continuing/incumbent candidates shall be confirmed for a term of up to two (2) years (**Article IX-A, Section 6.0 (c)**).
- 2) Hold selection/election/confirmation processes for coordinator(s)/coach(es) and/or dean(s) positions (can be done via Google Forms\*, Survey Monkey\*\*, etc.).
- 3) Finalize Coordinator(s)/Coach(es) Selection pursuant to **Article IX-A, Section 6.0**.
- 4) Finalize Dean(s) Election pursuant to **Article IX-A, Section 7.0**.

Please note that Matrix timelines may change pending potential negotiations.

Please also note that all iterations of your matrix should be labeled “*TENTATIVE*” as changes in enrollment, etc., may result in changes to your matrix.

**Email your Staff Relations Field Director for guidance or if you have any questions.**

**\*To Create a Voting Form using Google Forms**

- 1) **Log into your LAUSD Google Account (use your LAUSD single sign on, include @lausd, i.e. singlesignon@lausd.net).**
- 2) Go to Google Drive.
- 3) In the top left corner, click the red “New” button, go down to “more” and hover your mouse over that selection. Another drop-down will appear, select and click “Google Forms.”
- 4) At the top, there will be the “Form Settings” option, depending on who you want to have access to this form, as well as what information you want collected for the poll will determine which boxes you check. In order to not allow people to vote multiple times (and therefore skew the results) you will want to check the “Only allow one response per person” box.
- 5) The section immediately below the “Form Settings” will be labeled “Page # of #”. The first box is going to be the name of the form. Then what you would like to ask. Under question type there are numerous choices you can select, including, but not limited to: Checkboxes, Choose from a list, Multiple Choice, and several other options. Choose which is best for how you will be using the form.
- 6) In order to keep the voters from editing responses, and therefore altering the results after they’ve voted, keep unchecked the “Allow responders to edit responses after submitting” When you are finished click “Send Form.”
- 7) A dialogue box will appear, and you will have the option to copy and paste the link, share it via social media, or send an email (including a group email).
- 8) Then you are finished, the results of the poll will appear as a Google Sheets document in your Google drive with the same name as was given to the Google Form.
- 9) From the Google Form you have created you can also view the responses, or view the live form, which allows you to see what someone taking the poll will see, and edit accordingly if need be.

**For support:**

<https://support.google.com/docs/answer/87809?hl=en>

**Video Tutorial:**

<https://www.youtube.com/watch?v=-9GqZLL-wGo&list=UUdgTksW283OFC78pFcxIdA>

**Displacement Reference Form for UTLA Represented Employees**  
**(Consult with your Staff Relations Field Director Prior to Displacing any Employee)**

**Displacement of Classroom Teachers (Article XI, Section 6.0 a-j):**

An over-teachered condition exists when there are more qualified teachers than positions at a school or within a program or subject field at a school, or when a program or subject field is reduced, eliminated or moved from a school.

1. The school administrator shall reasonably determine in what program/subject field the over-teachered condition exists.
2. The school administrator shall inform the faculty of the number of positions being eliminated.
3. An employee may agree to be voluntarily displaced. However, employees who receive a Notice of Unsatisfactory Service or “below standard” evaluation shall be deemed ineligible (Art. X-A, Sec. 5.0). Voluntary displacements do not have return rights to the school.
4. If there are no volunteers, the teacher with the least District seniority will be displaced unless it is reasonably determined at the discretion of the immediate administrator that such teacher possesses special instructional skills or qualifications.
5. Special circumstances apply for secondary schools organized by departments and all schools with special education programs. Contact your Field Director if you have questions regarding recency and/or special skills/qualifications.

**Displacement of Counselors:**

A reduction in counseling norms can be handled as follows:

1. If all counselors possess teaching credentials, the principal may exercise complete discretion in returning one, to the classroom.
2. If some counselors possess teaching credentials, while others possess only PPS, the principal may return only those with teaching credentials to the classroom. Those with PPS only, remain.
3. If all counselors are PPS only, then the least senior counselor is displaced from the school.

**Ending/Terminating Temporary Adviser (Non-School Assignment) Position at LD or Central Office:**

A temporary adviser is a permanent certificated contracted employee who is given a temporary non-school assignment. Such employees work in central office, local district, or other regional District offices.

1. Administrator provides a written invitation to a meeting with the employee to discuss the employee's assignment for the next school year. Staff Relations Field Director provides the template for the written invitation.
2. Administrator provides employee with written notice of termination of current assignment. Staff Relations Field Director provides template for written notice.

OFFICE OF STAFF RELATIONS  
ANNUAL PERFORMANCE EVALUATION DUE DATES  
**SCHOOL BASED CLASSIFIED EMPLOYEES**  
**2021-2022 SCHOOL YEAR**

Employees in the bargaining Units listed below must have an annual performance evaluation issued no later than 20 working days prior to the end of the work year assignment. Automated evaluation forms are available on the Personnel Commission website. It is recommended you issue the evaluation by May 12, 2022 to meet the deadline. **Note:** there are no waivers of evaluations for the 2021-2022 school year.

If an employee is to receive a below standard rating on their performance evaluation, he/she must receive assistance and guidance no later than **March 25, 2022**. Assistance and Guidance may take the form of a conference memo or Letter or Reprimand and should pertain to the specific area in need of improvement.

**Unit B** – Campus Aides, Education Aides, Instructional Aides, Special Education Trainees/Assistants, Early Education Center Aides, et al.\*

**Unit C** – Building and Grounds Workers, Food Service Workers, Early Education Center Attendants, Microcomputer Support Assistants, et al.

**Unit F** – Teacher Assistants

**Unit S** – School Administrative Assistant, Food Service Managers, Plant Managers

Employees in the bargaining Units listed below must have a performance evaluation at least once a year.

**Unit D** – Office Technicians, Clerks, Library Aides

**Unit G** – School Supervision Aides, Community Representatives\*

	Conference Memo Due	Performance Evaluation Due
C Basis	3/25/2022	5/12/2022
B Basis	4/1/2022	5/20/2022
E Basis	4/18/2022	5/27/2022

Note: It is recommended that employee’s performance evaluations be consistent with the District’s timeline as referenced above.

*\*Principals must contact Talent Acquisition and Selection Branch for employees who are in restricted status (W1) to receive promotability forms.*



# Employee Assistance Program Service Summary for Los Angeles Unified School District

Available 24/7, 365 days a year  
Everything you share is confidential.\*

When you need help meeting life's challenges, the Anthem Employee Assistance Program (EAP) is here for you and your household members. Check out some of the services we offer – at no cost to you:



### Counseling

- Up to 3 visits per issue
- Face-to-face counseling or online visits via LiveHealth Online
- Can call EAP or use the online Member Center to initiate services



### Legal consultation

- 30-minute phone or in-person meeting
- Discounted fees to retain a lawyer
- Online resources, including free legal forms, seminars and a library of articles



### Financial consultation

- Phone meeting with financial professionals
- Consultation available during regular business hours – no time limits or appointments needed
- Online resources, including articles, calculators and budgeting tools



### ID recovery

- Identity theft risk level checked by specialists
- Help with reporting to consumer credit agencies
- Assistance filling out paperwork and negotiating with creditors



### Dependent care and daily living resources

- Information available on child care, adoption, summer camps, college placement, elder care and assisted living through the EAP website
- For help with everyday needs, like pet sitting, relocation resources and more



### Other anthemEAP.com resources

- Well-being articles, podcasts and monthly webinars
- Self-assessment tools for depression, anxiety, relationships, alcohol use, eating habits and more



### Crisis consultation

- Toll-free number for emergencies
- Round-the-clock help available
- Critical event support online to help with planning, coping and recovery resources when tragedy strikes



### On-demand digital resources

- The WellPost blog at anthemEAP.com , featuring Health & Wellness topics written by experts in the field

Need help? Give EAP a try today.  
Call us at 800-999-7222  
Or go to [anthemEAP.com](http://anthemEAP.com) and enter  
your company code: LAUSD

\* In accordance with federal and state law, and professional ethical standards. This document is for general informational purposes. Check with your employer for specific information about benefits, limitations and exclusions.

Language Access Services – (TTY/TDD: 711)

Spanish – Tiene el derecho de obtener esta información y ayuda en su idioma en forma gratuita. Llame al número de Servicios para Miembros que figura en su tarjeta de identificación para obtener ayuda.  
Chinese – 您有權使用您的語言免費獲得該資訊和協助。請撥打您的 ID 卡上的成員服務號碼尋求協助。

Anthem complies with applicable federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability or sex.

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