

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

**Confidential**

**TO:** Principals and Administrators

**DATE:** October 2015

**FROM:** Leticia Figueroa, Assistant Chief Human Resources Officer, Staff Relations

**SUBJECT: OCTOBER 2015 - UPDATES & REMINDERS**

**IMPORTANT DATES:**

**October 2015** Conduct Initial Planning Conferences (**See Attachments #3 and #4**)

**CERTIFICATED INFORMATION:**

**1. NON-REELECTION PROCESS FOR PROBATIONARY 2 AND PROBATIONARY 1 TEACHERS (OR EQUIVALENT)**

As a yearly key component, the Superintendent requires that all principals/administrators in collaboration with their supervisors make an “Affirmative Decision” regarding each non-permanent certificated employee. This Affirmative Decision process will determine if a non-permanent certificated staff member will receive permanent/regular status, if they will be retained in their position for the subsequent year, if they will be released from their current position and re assigned to a former class, or if they will be non-reelected and released from employment with the District.

The Board of Education must approve or deny the recommendation for non-re-election prior to March 15, 2016. All principals and certificated administrators will be required to decide if they will provide “Affirmative Endorsement” to the probationary and provisional certificated employees assigned to their site.

- For Probationary 2 teachers ( or equivalent) , on a form provided by the Human Resource Division, Principals and Local District Superintendent Designee will either endorse the employee allowing them to progress to the next level or status **or not re-elect** the employee from employment of current assignment. Endorsement decisions for Probationary 2 employees will need to be submitted mid-November (dates to follow).
- For Probationary 1 and Provisional employees , you may access your Probationary 1 employee roster online through the Certificated Performance Evaluation System (CPES) portal via the regular login process at: <https://stulls.lausd.net/stulls/index.jsp> and once logged-in, you can click on the link labeled “Probationary 1 Roster”. If you are unable to log into CPES, the Workforce Data Unit will send you a copy of your roster. Endorsement decisions for Probationary 1 employees will need to be submitted mid-January (dates to follow).

## **2. CHILD ABUSE CONFIDENTIAL REPORTING**

**Do not** reference in a conference memo or in a Certificated Day-to-Day Substitute Teacher Report (Inadequate Service Report) the fact that you have filed a child abuse report. All Child Abuse Reports must remain **confidential** and are not to be disclosed.

## **3. CHAPTER CHAIR ANNOUNCEMENTS AT FACULTY MEETINGS**

The Chapter Chair shall have the right to make appropriate brief announcements within the first 45 minutes of faculty meetings. (**LAUSD/UTLA CBA, Article IV, Section 8.0-i**)

## **4. 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 30 days of the District's receipt of the document. The document shall not be either placed in the personnel file or 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**)

## **5. EDUCATOR DEVELOPMENT AND SUPPORT: TEACHERS (EDST):**

EDST is the performance evaluation process for teachers of Pre-K (SRLDP, TK) to 12<sup>th</sup> Grade students, including Special Education Resource teachers, Special Day Program teachers, Early Education Center teachers, (excluding Special Education teachers in Early Education Centers), and Career Technical Education (CTE) teachers at secondary schools. Other certificated teacher positions (PSM, Adult and Career Education teachers, academic coaches, coordinators, deans, and counselors) as well as school-based support services personnel (School Psychologists, PSA Counselors) will not utilize the multiple measure performance review system for the 2015- 2016 school year; these employees will be evaluated under the legacy online Certificated Personnel Evaluation System (CPES). All positions will continue to be evaluated under the traditional Article X provisions. Any questions related to the EDST process should be directed to the Local District Teaching and Learning Coordinator. Under the new Tentative Agreement, Attachment G, one Formal Observation should be conducted during the evaluation cycle. Additional Formal Observations may be held if mutually agreed upon. One Informal Growth Plan Visit should be conducted during the evaluation and additional Informal Growth Plan Visits can be conducted if mutually agreed upon. Informal Growth Plan Visits DO NOT restrict the additional observations that principals and administrators should conduct as a part of their routine supervision of instruction. (See BUL-5335.4)

## **6. DETERMINING WHO WILL BE EVALUATED:**

- a. **Teachers with a Below Standard Evaluation (BSE) the previous year.**
- b. **Teachers with significant areas of Needs to Improve**
- c. **Teachers with > 13 days of absence in 2014-2015**
- d. **Non-Permanent and Qualifying Personnel:**
  - i. **Probationary (B1, B2)**
  - ii. **District Intern (G1 , G2)**
  - iii. **University Intern (F1, F2)**
  - iv. **Temporary Contract personnel ( K1)**
  - v. **Qualifying Personnel (Q1, Q2)**
  - vi. **Provisional (V1)**

Therefore, it is *essential* that you *immediately notify your Staff Relations Field Director* if you are considering issuing a Below Standard Stull Evaluation to any probationary teacher.

**7. SUBSTITUTE TEACHER EVALUATIONS**

Substitute teachers who are continuously assigned to the same location for more than 20 days shall be evaluated not less than once each semester on Form 1022. (**LAUSD/UTLA CBA, Article X, Section 8.0**)

**8. 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. Only day-to-day substitutes can receive ISRs. The site administrator may issue for cause, a notice of inadequate service to a day-to-day substitute. Such notice shall be issued within ten 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 issuance of such a notice, the site administrator shall make a reasonable effort to contact and confer with the substitute regarding the allegations. 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 representative of another employee bargaining unit. (**LAUSD/UTLA CBA, Article X, 7.0**).

**9. CONTRACT POOL TEACHERS**

Regular employees, assigned to the Contract Pool are to be treated as contracted teachers; they are **not to be issued an Inadequate Service Report. Always confirm whether a substitute is a contract pool teacher or a day-to-day substitute.** They are regular employees and should therefore be invited to a conference to discuss any concerns. After the conference you should issue a Summary of Conference (conference memo) as you would any other teacher on your staff in the same situation. Please contact your Field Director for questions.

**10. INFORMAL CONFERENCE PROVISION OF THE 2014-2017 LAUSD-UTLA CBA:**

Article V, Section 7.0 states the grievant must, before filing a formal grievance, attempt to resolve any potential grievance by means of an informal conference with the grievant's immediate supervisor. That informal conference shall be requested in writing to the immediate administrator within fifteen (15) days of the occurrence of the act or omission which gives rise to the grievance, or of the date when the grievant could be reasonably expected to know of the act or omission which gives rise to the grievance. If you receive a written request for an informal grievance, please refer to Office of Staff Relations Memorandum from Leticia Figueroa, Assistant Chief Human Resources Officer, dated August 19, 2015 and **contact your Staff Relations Field Director immediately.** (See Attachment #5)

**11. UNION REPRESENTATION ON SCHOOL SITE CAMPUSES**

Union representatives are to be permitted to enter school campuses following guidelines addressed in the LAUSD Visitor's policy.

**12. TEACHER ASSISTANTS: RELEASE OF TAs WHO FAILED TO VERIFY ENROLLMENT OR SUCCESSFUL COMPLETION OF UNITS**

By now your Teacher Assistants should have submitted to you verification of their current enrollment in college coursework as well as verification of successful passage of coursework from the spring semester. Those who have not verified their current enrollment and/or successful passage of college coursework from the spring semester should be released from service. TAs who have not met their contractual obligation should be notified of their release in writing.

Once college coursework has been verified, in accordance with the contract, site administrators must compile and post at the site a list of assigned employees in descending order of completed qualified (counting toward baccalaureate degree and teacher credential) college units, noting opposite each employee their District date of hire seniority date. Please contact your Senior HR Representative for assistance with this process.

**13. TEACHER ASSISTANT POSITIONS RECENTLY CLOSED DUE TO BUDGET CUTS**

If you recently closed Teacher Assistant position(s) and laid off TAs, remember that TAs who had more than one year of service are entitled to reemployment. If you are able to add back a TA position, it should be offered to TAs in reverse order of the layoff. TAs returning to a position must still meet the contractual requirement of continual enrollment and passage of college coursework. Please contact your Senior HR Representative for questions.

**14. TEACHER ASSISTANTS WITH A DEGREE**

If you have teacher assistants that have completed the requirements for a Bachelor's degree and a teaching credential, they may remain on the degree track provided they meet the minimum non-degree track course requirements and also participate in CBEST preparation classes. If the CBEST class is a college course, it shall satisfy the course requirement for that employee. If they have completed CBEST, they shall remain on the degree track provided they continue to meet the non-degree track requirements.

**15. TRAINING AVAILABLE FOR SUPERVISORS OF CLASSIFIED EMPLOYEES**

Staff Relations Senior Human Resources Representatives are teaching courses through Organizational Excellence. The classes are titled, "The Evaluation Process for Classified Employees" and "The Discipline Process for Classified Employees." Supervisors of classified staff may enroll in either of these classes through the Learning Zone. To register, visit the Learning Zone at <http://lz.lausd.net>. Search by ***Class Offerings*** and then a ***Keyword*** from the titles above. **We recommend all staff who manage or review classified employees attend these two informative training sessions.**

## 16. BREAK/LUNCH TIMES FOR UNITS B, C, D, AND F

HOURS OF ASSIGNMENT	BREAK(S)	LUNCH
3 or fewer	None	None
4	One - 10 minutes paid	None
5	One - 10 minutes paid	*Minimum 30 minutes unpaid **(except Unit D)
6 to 8	Two - 10 minutes or One - 20 minutes paid	Minimum 30 minutes unpaid

### **\*Units B (Special Education Assistants, Campus Aides, Instructional Aides) or F (Teacher Assistants):**

Rest periods cannot lengthen lunch period or shorten workday.

### **\*\*Unit D (clerical staff except SAA, Library Aides):**

Rest periods may be combined with lunch period by mutual agreement with supervisor.

## 17. INSTRUCTIONS FOR COMPLETING TIME CARDS

Per the Payroll Concepts Manual of 2012, page 45, Classified Employees all classified employees, except those identified in Personnel Commission Rule 596 (over-time exempt), sign in by recording the actual time of arrival but not earlier than the assigned start time and sign out by recording the actual time of departure but not later than the scheduled stop time from their assigned work location(s). This procedure helps to manage the calculation of overtime.

Classified employees whose principal duties and responsibilities are designated as executive/administrative in Personnel Commission Rule 596 (over-time exempt), indicate daily attendance by initialing a time sheet or a time card. Unclassified Employees

All unclassified employees are required to sign-in and sign-out showing the actual time of arrival but not earlier than the assigned start time to and departure from their assigned work location(s).

## **GENERAL INFORMATION:**

**18. REMINDER ON BEHALF OF OGC: SCHOOL FILES PROJECT:** The LAUSD School Files application is the LAUSD application designed for Principals and Administrators to upload inappropriate behavior-related documents on a regular basis into the School Files system. This web-based application only requires a few entries to add documents. Please note that all user logins are recorded. Users are to upload documents as PDF files. Login to the application using your SSO account at: <https://bes7.lausd.net/schoolfiles/login.aspx>. For specific instructions on completing this process and for a copy of the mandatory coverage, please contact your Staff Relations Field Director or Michael Voigt at (213) 241-8021 or through email [Michael.voigt@lausd.net](mailto:Michael.voigt@lausd.net).

## **19. STAFF RELATIONS ASSISTANCE**

This office serves as a resource to administrators on matters of evaluation, discipline and contract interpretation. Teachers and classified employees should be referred to their respective unions for assistance. Administrators should not consult with the unions for advice. They should contact their Field Director or Senior Human Resources Representative with questions.

## **20. NO STAFF MEETINGS ON ELECTION DAY (BULLETIN 1704.1)**

You are to ensure that employees are not hindered from being able to reach their respective polling locations and that no faculty meetings should be held on Election Day. Any banked time events should be held as planned. Other mandatory or permissive after-school activities involving staff should not be scheduled on Election Day.

## **21. EXTENDED LEAVES OF ABSENCE (WORKERS COMP OR ILLNESS)**

Employees allowed to remain on a long-term leave, and are then reported for pay without administrative monitoring continues to be a problem. It is the responsibility of the school site administrator to follow up on all leaves. For Workers' Compensation coverage, you should be in contact with the Claims Adjuster at Sedgwick to stay apprised of the employee's status and return date. If you need additional assistance with any particular employee, a current claim, or return to work procedures, contact Linda Cass, LAUSD Office of Risk Management, at (213) 241-3839. For employees absent due to illness for longer than twenty (20) days, formal Leave of Absence forms and other documentation must be submitted. Employees who have not submitted required leave documents should not be time-reported after twenty days of absence. The Leave of Absence Packet on the Personnel Commission web site (found under Forms) is very informative.

## **22. EMPLOYEES RETURNING TO WORK AFTER EXTENDED LEAVES OF ABSENCE (WORKERS' COMP OR ILLNESS)**

Should you have any questions or concerns regarding employees returning to work after an extended leave or illness absence or that report to work with restrictions, contact your Senior Human Resources Representative or the Office of Risk Management, Integrated Disability Management at (213) 241-3138.

**If you have any questions about these items or other contract or discipline issues, please contact your Field Director assigned to your District regarding UTLA or Senior Human Resources Representative at (213) 241-6056 for Unit D (clerical staff) and for Units B, F, G and S (paraprofessional, campus supervision employees, and the SAA).**

## Staff Relations Telephone Numbers & Email Addresses

General Number: (213) 241-6056 Fax: (213) 241-8405

Office Staff		
<a href="#">Dr. Kristen Murphy</a>	Administrator, AALA	(213) 241-6056
<a href="#">Dr. Jack Foote</a>	Field Director	(213) 241-8243
<a href="#">Lorri Gossett</a>	Sr. HR Representative	(213) 241-6864
Local District Northeast		
<a href="#">Veronica Moscoso</a>	Field Director	(818) 252-5435
<a href="#">Francisco Serrato</a>	Shared Field Director	(818) 252-5436
<a href="#">Open</a>	Sr. HR Representative	(213) 241-8242
Local District Northwest		
<a href="#">Dr. Maribel Luna</a>	Field Director	(818) 654-3641
<a href="#">Francisco Serrato</a>	Shared Field Director	(818) 654-3619
<a href="#">Sarah Houston</a>	Sr. HR Representative	(213) 241-8240
Local District South		
<a href="#">Juan Alfayate</a>	Field Director	(310) 354-3419
<a href="#">Carlen Powell</a>	Shared Field Director	(310) 354-3472
<a href="#">Terri Lyons</a>	Sr. HR Representative	(213) 241-2563
Local District East		
<a href="#">Susana Cuevas</a>	Field Director	(323) 224-3353
<a href="#">Eric Maxey</a>	Shared Field Director	(323) 224-3120
<a href="#">Cathy Kelly</a>	Sr. HR Representative	(213) 241-8248
Local District West		
<a href="#">Brenda Olortegui</a>	Field Director	(310) 914-2153
<a href="#">Carlen Powell</a>	Shared Field Director	(310) 914-2150
<a href="#">Lorri Gossett</a>	Sr. HR Representative	(213) 241-6864
Local District Central		
<a href="#">Isaias Martinez</a>	Field Director	(213) 241-0184
<a href="#">Eric Maxey</a>	Shared Field Director	(213) 241-8257
<a href="#">Stacey Smith</a>	Sr. HR Representative	(213) 241-8227
Division of Adult Ed		
<a href="#">John Gamboa</a>	Field Director	(213) 241-3725

**STAFF RELATIONS  
PARAPROFESSIONALS  
BEGINNING – OF – YEAR REMINDERS**

**EXPECTATIONS**

- ✓ Work hours (including sign-in/sign-out and timecard procedures, absence and call-in procedures)
- ✓ Attendance expectations (the instructional program depends on everyone, including part-time aides, being at work every day)
- ✓ Daily schedule(s)
- ✓ Role of paraprofessional (i.e. to work directly with students)
- ✓ Review student IEPs with classroom teacher
- ✓ Information on supporting the instructional program that would be relevant to all paraprofessionals
- ✓ Guidelines for supervision duties during nutrition/recess, lunch, and PE
- ✓ Student behavioral standards and expectations (in classroom, on the school yard, and whole campus)

**POLICIES**

- ✓ LAUSD Attendance Policy
- ✓ Dress standards (see BR 1906)
- ✓ LAUSD Code of Conduct with Students (BUL 5167.0)
- ✓ Ethics Policies (BUL 4748.0)
- ✓ Responsible Use Policy (RUP) for District Computers and Network Systems (BUL 999.11)
- ✓ Bullying and Hazing Policy (Student to Student and Student to Adult) (BUL-5212.1)
- ✓ Child Abuse and Neglect Reporting Requirements (BUL 1347.2)
- ✓ Family and Medical Leave Act/California Family Rights Act Policy (BUL-1205.2)
- ✓ Sexual Harassment Policy (Employee to Employee) (BUL-1893.1)
- ✓ Sexual Harassment Policy (Student-to-Student, Adult-to-Student, and Student-to-Adult) (BUL-3349.1)
- ✓ Social Media Policy for Employees and Associated Persons (BUL-5668.1)

**TEACHER ASSISTANTS**

- ✓ College enrollment requirements for TAs
- ✓ Information sheet on the TA's school of attendance and course of study (to be filled out and returned to AP/Coordinator)

**MISCELLANEOUS**

- ✓ Staff/Track (including "people to know" and School Committee assignments)
- ✓ Map of campus
- ✓ School Safety and Emergency Procedures

With all performance expectations, especially attendance, punctuality, course requirements, and work hours, advise on the consequences of failure to perform (i.e. may result in disciplinary action).



**COLLEGE COURSE REQUIREMENTS FOR TAs**

**References: Unit F Collective Bargaining Agreement  
(On-line at LAUSD web site, under Offices, then Union Contracts)**

**TA's Responsibility:**

- Degree-track: Complete 12 qualifying college semester units annually (commenced & successfully completed within school year July 1 – June 30)  
**(Article VIII, Section 2.1)**

**Or**

Non-degree track: Maintain continuous enrollment in a college course at all times during the school year (Aug. – June). Course units must be directly related to the employee's service to the District and must be for the purpose of increasing the employee's knowledge, understanding and skills related to the employee's employment by the District.  
**(Article VIII, Section 3.1)**

- Submit documentation at the beginning of each semester, but no later than each September 30 and March 31:
  1. a. Form 503-103 completed by the college/university and the employee as evidence of enrollment for current semester/quarter.

**Or**

- b. Other acceptable evidence of registration/enrollment.

**AND**

2. Evidence of completion of courses (e.g. transcript) from the previous semester/quarter.

**Administrator's Responsibility:**

- Advise TAs at the beginning of each semester (i.e., in August and January) of the September/March deadlines and enforce deadlines.
- Keep completed 503-103 forms or other verification of enrollment and completion of units on file at school.
- Track completion of the qualifying units or course requirements.
- Track total # of units completed by each TA.
- Annually post TA Seniority list with the number of qualifying college units for each TA.  
**(Article X, Section 2.1)**

**STAFF RELATIONS  
TEACHER EVALUATION CHECKLIST  
2015 – 2016**

NAME \_\_\_\_\_ EMPLOYEE NUMBER \_\_\_\_\_ # OF YEARS TEACHING \_\_\_\_\_

STATUS (R1, B2, ETC.) \_\_\_\_\_

DATE INITIAL PLANNING SHEET ISSUED \_\_\_\_\_

DATE OF INITIAL CONFERENCE WITH SIGNATURES AND DATE OF CONFERENCE (Required) \_\_\_\_\_

<u>OBSERVATION</u>	<u>CONFERENCE</u>	<u>MEMO ISSUED</u>	<u>ASSISTANCE AND GUIDANCE</u>
1. August , 2015	August , 2015	August , 2015	Lesson Plans Classroom Mgmt
2. September			
3. October			
4. November			
5. December			
6. January			
7. February			
8. March			
9. April			
10. May			
11. June			

DATE OF INVITATION MEMO \_\_\_\_\_

**BOTH "MEETS STANDARDS" AND A BELOW STANDARDS" EVALUATION CAN BE GRIEVED IF THERE IS "SIGNIFICANT DISPARITY" BETWEEN THE RATING AND THE NEGATIVE COMMENTS.**

DATE OF CONFERENCE WITH TEACHER AND REP (NO REP NEEDED IF 'MEETS') \_\_\_\_\_

DATE OF ISSUANCE OF EVALUATION (CHECK FOR AP'S SIGNATURE AND DATE IF YOU ARE NOT THE EVALUATOR)  
GIVE COPY WITH SIGNATURES TO THE EMPLOYEE AT THE MEETING \_\_\_\_\_

DATE SUBMITTED ELECTRONICALLY \_\_\_\_\_

DATE OF EMPLOYEE RESPONSE (THE EMPLOYEE MAY ATTACH A WRITTEN RESPONSE WITHIN 10 DAYS FROM THE DATE RECEIVED) \_\_\_\_\_

DATE HARD COPY OR SCANNED COPY OF EMPLOYEE'S RESPONSE PLUS ATTACHMENTS MAILED/EMAILED TO EMPLOYEE RELATIONS, BEAUDRY 14<sup>TH</sup> FLR/MARIANNE.BELLACCOMO@LAUSD.NET \_\_\_\_\_  
INFORM TEACHERS RECEIVING A BELOW STANDARD EVALUATION THAT THEY WILL BE EVALUATED NEXT YEAR.

**STAFF RELATIONS  
ADMINISTRATIVE TASK CALENDAR FOR CERTIFICATED EVALUATIONS  
2015-2016**

**AALA REPRESENTED EMPLOYEES**

	I* Distribute Initial Planning Sheet	II* Return Initial Planning Sheet	III* Initial Planning Conference	IV** Evaluations Issuance Deadline
<b>Basis A</b>	<b>07/01/15</b>	<b>08/07/15</b>	<b>08/21/15</b>	<b>05/10/16</b>
<b>Basis E</b>	<b>07/23/15</b>	<b>09/03/15</b>	<b>09/18/15</b>	<b>05/10/16</b>
<b>Basis B</b>	<b>08/03/15</b>	<b>09/11/15</b>	<b>09/25/15</b>	<b>05/10/16</b>

**UTLA REPRESENTED EMPLOYEES**

	I* Access Initial Planning Sheet	II* Submit Initial Planning Sheet	III* Initial Planning Conference	IV** Evaluations Issuance Deadline
<b>Basis A</b>	<b>07/01/15</b>	<b>08/07/15</b>	<b>08/21/15</b>	<b>05/25/16</b>
<b>Single Track</b>	<b>08/17/15</b>	<b>09/25/15</b>	<b>10/22/15</b>	<b>05/10/16</b>

**FOUR TRACK**

<b>Track A</b>	<b>08/14/15</b>	<b>09/25/15</b>	<b>10/09/15</b>	<b>05/20/16</b>
<b>Track B</b>	<b>07/01/15</b>	<b>08/07/15</b>	<b>08/21/15</b>	<b>05/20/16</b>
<b>Track C</b>	<b>07/01/15</b>	<b>08/07/15</b>	<b>10/02/15</b>	<b>05/20/16</b>
<b>Track D</b>	<b>07/01/15</b>	<b>08/07/15</b>	<b>08/21/15</b>	<b>03/31/16</b>

**\*RECOMMENDED** that tasks be completed no later than date listed. (Article X, Section 4.0)

**\*\*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).

**\*\*For AALA-Represented Employees**, the Final Evaluation Report must be issued no later than May 10, 2016 (Article VII, Section 4).

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

**TO: Site Administrators**

**DATE:** August 19, 2015

**FROM:** Leticia Figueroa, Assistant Chief Human Resources Officer  
Office of Staff Relations

Rob Samples and Gifty Beets, Assistant Directors  
Office of Labor Relations

**SUBJECT: IMPLEMENTATION OF THE NEW INFORMAL CONFERENCE  
PROVISIONS OF THE LAUSD-UTLA AGREEMENT**

The purpose of this memorandum is to summarize changes and to highlight site administrator responsibilities to implement the informal grievance process provisions of the new UTLA Agreement. Please review that text, and also the provisions below, to identify any implementation actions required of administrators and staff. The major changes are as follows:

Grievance Procedure (MOU Article V – Attachment A):

Informal Conference - The parties have agreed that the grievant must, before filing a formal grievance, attempt to resolve any potential grievance by means of an informal conference with the grievant's immediate supervisor. That informal conference shall be requested in writing to the immediate administrator within fifteen (15) days of the occurrence of the act or omission which gives rise to the grievance, or of the date when the grievant could be reasonably expected to know of the act or omission which gives rise to the grievance. [Note that all references to numbers of days herein refers to any calendar days excepting Saturdays, Sundays and legal or school holidays.]

Upon receipt of a written request for an informal conference, administrators should do the following:

1. Schedule an informal conference meeting with the grievant, to be conducted within five (5) days of the above written request.
2. The employee may attend the meeting individually, or may choose to be accompanied by the school's UTLA Chapter Chair or other representative of the employee's choice. The administrator should inquire of the grievant as to his or her intent to bring accompaniment or representation to the meeting. If the grievant intends to bring accompaniment or representation, ask the grievant for the name and title of the person.
3. After obtaining information on accompaniment/representation, proceed with one of the following options:

- a) If the grievant chooses to handle the meeting individually, with no accompaniment, proceed with the informal conference with the grievant as scheduled.
  - b) If the grievant intends to bring a site-based representative (e.g., the Chapter Chair or another teacher at the school), the administrator may also obtain site-based administrative accompaniment (such as the Assistant Principal, other administrator or the School Administrative Assistant) and proceed with the informal conference with the grievant as scheduled. If that accompaniment is not available on a timely basis, the site administrator should contact the Staff Relations Field Director for advice concerning other possible accompaniment options, which may include the need to change the conference meeting date.
  - c) If the grievant intends to bring a non-site based representative, contact the Staff Relations Field Director to discuss the potential need for assistance prior to holding the meeting.
4. Provide a written reply to the informal conference within five (5) days following the informal conference meeting.

Grievance Filing: If no resolution is reached through the informal process as provided above, the grievant may file a Step One grievance, using the UTLA-District Grievance form, within thirty (30) days of the occurrence of the act or omission giving rise to the grievance, or of the date when the grievant could be reasonably expected to know of the act or omission giving rise to the grievance. Note that this filing deadline runs from the date of the act or omission giving rise to the grievance, not the date of the informal conference.

Step One Meeting: A meeting between the immediate administrator and the grievant shall take place within ten (10) days of the presentation of the written Step One grievance. Site Administrators should:

1. Contact your Staff Relations Field Director to arrange for their participation at the Step One meeting, and to obtain advice.
2. Within five (5) days following the meeting, reply to the grievance in writing. This will terminate Step One of the grievance process.

Step Two Meeting: If the grievance is not resolved at Step One, the Grievant may, within ten (10) days after the termination of Step One, present the grievance to the appropriate superintendent, division head or designee. Within five (5) days from receipt of the grievance, a meeting shall take place to discuss the matter. The appropriate superintendent, division head or designee shall reply to the grievance in writing within five (5) days following the meeting, and the receipt of such reply shall terminate Step Two.

Note that each of the above time limits represent revisions to the previous contractual deadlines governing grievance procedures.

Please contact your Staff Relations Field Director if you have any questions.

c: Local District Superintendents  
Staff Relations Field Directors