

INTER-OFFICE CORRESPONDENCE
LOS ANGELES UNIFIED SCHOOL DISTRICT
STAFF RELATIONS

TO: Principals and Administrators

DATE: April 2017

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

SUBJECT: April 2017 - UPDATE AND REMINDERS **REVISED**

IMPORTANT DATES:

<i>Prior to Posting Matrix</i>	Coordinator and Dean Selection
April 21, 2017	<i>Post the Matrix for Single Tracks</i>
April 14, 2017	Evaluations Issuance Deadline for Year-Round Track D Employees
April 15, 2017	Deadline to Apply for (permissive) leaves of absence.
May 9, 2017	Evaluations Issuance Deadline for Single Track Calendar Employees
May 10, 2017	Evaluations Issuance Deadline for AALA Represented Employees
May 19, 2017	Notification of Teacher Tentative Assignments for Single Track <i>Post the Matrix four weeks prior to selection.</i>

GENERAL INFORMATION:

1. 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://schoolfiling.lausd.net>. For specific instructions on completing this process and for a copy of the mandatory coverage, please contact your Staff Relations Field Director or Emily Mohr at emily.mohr@lausd.net (Attachment #1)

2. 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.

3. VACATION FOR "A" BASIS STAFF

There is a procedure in the bargaining agreements for scheduling vacation for vacation-earning employees (A-basis administrators and all classified employees but not Teacher Assistants). The process begins with a communication from the administrator to affected staff, by March 15, which should list:

- Dates when employees must take vacation (for most employees, this includes winter and spring breaks, and for C-basis classified employees, this will utilize most of their vacation accrual).
- Dates when no employee may take vacation. [e.g., you may not want employees on vacation at the beginning or end of the school year]
- Dates when employees may or may not take vacation, including limits on number of days or the number of employees who will be approved at the same time.

The second step is that by April 15, employees shall respond to the administrator with requested vacation dates, taking into account the administrator's guidelines and their own vacation availability as well as the need to stay below their vacation cap. Within 15 calendar days after that, the administrator shall provide a written acknowledgment either approving or disapproving the requested days. The basis for any denial shall be included on the explanation line of the request form. [Request for Absence - Non Illness](#)

4. VACATION CAP

It is important that supervisors work with employees to have them take vacation to ensure that employees' vacation balances will not be over their cap. Scheduling employees' vacation time now for the coming months will provide the most flexibility and will ensure sufficient staffing of schools and offices. Contact your timekeeper and/or approver to find out which employees are over the vacation cap. They can access and print a vacation statement at any time via BTS using the transaction code ZTMRVACBAL.

CERTIFICATED INFORMATION:

1. TENTATIVE ASSIGNMENT OF CLASSES (MATRIX)

The tentative matrix shall be posted approximately four weeks before selection of classes and teachers shall be notified of tentative assignments as soon as feasible, but not later than twenty one (21) calendar days prior to the teacher's last scheduled work day ([Waiver to Amend Article IX-A, Section 2.0 \(a\)](#)). As part of the matrix process, you must assess the percentage of permanent and non-permanent teachers at your site in order to equitably spread permanent and non-permanent teachers across tracks and grade levels. Please review the "Suggested Time Sequence for Staffing" (attached) appropriate to your school schedule and continue with all necessary preparations (**Attachments #2 and #3**) (**Article IX –A, Section 2.0**).

2. FULL TIME COORDINATOR SELECTION PROCEDURE

The selection process must be conducted in the Spring semester prior to the preparation of the matrix of classes. If the candidate that the site administrator puts forward for confirmation is not confirmed by a majority vote, the site administrator and chapter chair shall immediately inform the faculty members that the coordinator position is still vacant. If the non-confirmed candidate received 40% - 50% of the votes, that candidate and the other interested candidates may submit statements of interest within 24 hours in a single-track school or 72 hours in a multi-track school. The site administrator and chapter chair shall seek to mutually agree upon the coordinator selection from among those candidates who submitted statements of interest. If no agreement is reached mutually, a two-member team from the District/UTLA Dispute Resolution Panel will resolve the issue. Also, all coordinators are elected for up to two years – except if it is the first term of the confirmed coordinator (**Article IX-A**).

3. DISPUTE RESOLUTION PROCEDURE FOR TRACK, 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 track, 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 can provide you with the appropriate form(s) **(Article IX-A, Section 2(e) and (f))**.

4. ELECTION OF CERTIFICATED EMPLOYEE REPRESENTATIVES TO LOCAL SCHOOL LEADERSHIP COUNCIL

Secondary teachers' elections are to be in April before the secondary master schedule is established; **elementary** teacher elections are to be in late spring after assignments for the next year have been tentatively set **(Article XXVII, 2.8)**.

5. NON RE-ELECTION OF PROBATIONARY 1 AND DISTRICT INTERN TEACHERS

If you have determined that you will not re-elect any probationary teachers, you are required to meet with them face-to-face and provide notice of the decision. You will receive notification from Human Resources regarding this process. Contact your Field Director if you have questions or need additional support.

6. ASSISTANCE AND GUIDANCE FOR TEACHERS

If you are anticipating that a permanent teacher will be receiving a "Below Standard" evaluation, please contact your Staff Relations Field Director as soon as possible.

7. CONTRACT POOL TEACHER EVALUATIONS

Evaluations must be done for contract pool teachers who have been assigned to your site for one semester or more. If a pool teacher was transferred to your site, the evaluation should be done in conjunction with input from the previous school(s). Pool teachers defaulted to a school site to meet reasonable accommodations may be evaluated at the principal's discretion, in consultation with your Instructional Director. It is especially critical to issue an evaluation for those probationary pool teachers who will be eligible for permanent status. Call your Staff Relations Field Director if you are unsure about this process **(Article X, Section 5.0)**.

8. MID-YEAR WARNING

Employees who will be receiving an Overall "Below Standard" evaluation should be given notice mid-year via a Conference Memo following a classroom observation (end of December for multi-track schools, January for single track schools). Administrators are to provide written recommendations and assistance for improvement, and must also give warning as to the consequences of failure to improve. This notice is to be given with sufficient time for the employee to implement the assistance provided. **However, if you have concerns regarding an employee and you did not give the mid-year warning, issue the mid-year warning immediately or as soon as possible in a conference memo following an observation.** Please forward this conference memo with the mid-year warning to your Staff Relations Field Director **(Article X, Section 5.0)**.

9. 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 a 1022 form **(Article X, Section 8.0)**.

10. FINAL EVALUATION COMPLETION DATES

Be sure to take note of the following ***deadlines for issuance of final evaluations*** for UTLA Bargaining Unit Members:

Remember that a teacher receiving a "Below Standard" evaluation (BSE) must have received a **mid-year notification and must receive the BSE attachments as part of their final evaluation**. Teachers receiving "Needs Improvement" comments must have been provided with written assistance and guidance **(Article**

X- 6.0). If you plan to issue a BSE, remember to notify the person in writing and inform them of their right to have a representative attend the meeting.

For UTLA-Represented Employees, the Final Evaluation Report must be issued no later than **May 9, 2017** (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, 2017** **(Article VII, Section 4.0)**.

Remember that **Adult and Career Education teachers, Pre K Special Education teachers, Special Education teachers in early education centers, academic coaches, teacher librarians, coordinators, deans, and counselors** as well as school-based support services personnel (school psychologists, PSA Counselors, etc.) **will not** be evaluated using EDST for the 2016-2017 school year, but will continue to be evaluated with the **Certificated Performance Evaluation System (CPES)**. Access the CPES portal at <https://stulls.lausd.net/stulls>.

11. 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 Specialist by **April 15, 2017 (Article XII, Section 21.0, UTLA)**.

12. TRANSITIONAL KINDERGARTEN (TK)

SB 876 added additional requirements for transitional kindergarten (TK) teachers:

1. At least 24 units in early childhood education, or childhood development, or both
2. Professional experience in a classroom setting with preschool age children comparable to the 24 units described above.
3. 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.

Current and former credentialed teachers who taught SRLDP classes for 75% or more of any academic school year on or before July 1, 2015, can teach TK or ETK classes without the added additional requirements.

Any current teacher assigned to teach TK or a TK/K combination class after July 1, 2015 will have until January 31, 2018 to meet the added additional requirements.

Any current teacher assigned to teach SRLDP after July 1, 2015 will have until January 31, 2018 to meet the added additional requirements.

TK TEACHER SELECTION

1. Teachers should submit preference forms and list their qualifications.
2. Permanent teachers shall be allowed to make their request before the site administrator assigns a non-permanent teacher.
3. 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.

13. EXPANDED TRANSITIONAL KINDERGARTEN (ETK)

Students who have their fifth birthday after December 2 **do not** qualify for TK, but may be enrolled in ETK. **ETK classes may not be combined with TK or Kindergarten classes.**

ETK TEACHER SELECTION

1. On the school matrix, ETK should be listed on a separate line.
2. Teachers requesting ETK should also submit preference forms and list their qualifications.
3. Permanent teachers shall be allowed to make their request before the site administrator assigns a non-permanent teacher.
4. 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.

14. BANKED TIME PROFESSIONAL DEVELOPMENT/FACULTY MEETINGS

As a reminder, Principals are to utilize a formal sign-in sheet for purposes of documenting attendance at faculty/banked-time professional development/departamental/grade level meetings. Principals are to ensure that meeting sign-in sheets (PD and Banked Time meetings should have separate sign-ins) contain the school name, date, beginning and ending times, meeting locations, employee names (typed or printed), employee numbers, and employee signatures. Maintain all sign-ins and agendas for each meeting in a secure and accessible location.

15. CONFERENCE MEMOS FOR CERTIFICATED EMPLOYEES

When holding a conference with an employee to discuss his/her conduct, administrators should first consult with their Staff Relations Field Director *prior* to inviting the employee to the conference. If you intend to issue a conference memorandum to memorialize the conference, include the following when sending the draft conference memo to your Staff Relations Field Director:

- A. Draft conference memo
- B. All evidence from the investigation. Evidence may include written statements, logs, pictures, etc. (Operations Coordinators will assist administrators with the investigation)
- C. The most recent performance evaluation, including signatures and all of its attachments

After holding the conference with the employee, issuing the written conference memo (within four days of the meeting), and giving him/her time to respond in writing, send your Staff Relations Field Director a PDF copy of the memorandum that includes the following:

- A. Issuing administrator's initials by his/her name on the memo
- B. All attachments that were provided to the employee.
- C. Any written response that the employee submits in response to the conference memo
- D. When you send it, in the email, inform your Field Director what discipline, if any, you wish to pursue

16. CONTRACT POOL TEACHERS CONFERENCE MEMOS

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.

17. ITINERANT CERTIFICATED EMPLOYEES- CONFERENCE MEMOS

Itinerant employees are assigned either centrally or by a Local District administrator. These employees are supervised by these administrators who bear the direct responsibility for evaluating their performance. Examples of itinerant employees include Special Education Related Services personnel (Occupational Therapists, Speech and Language Therapists, Adapted PE Teachers, etc.), Itinerant Arts Teachers, Instructional Technology Facilitators, Nurses, PSA Counselors, and a host of other staff members. If performance or conduct concerns arise regarding these employees, contact their direct supervisors to coordinate the plan to address these issues. If you have additional questions regarding itinerant employees, contact Dr. Frank Serrato, Field Director, at fserrato@lausd.net or 213-241-8243.

CLASSIFIED INFORMATION:

1. CHANGE IN WORK SCHEDULES FOR CLASSIFIED EMPLOYEES

Classified employees must be given advance notice before their schedule can be changed. The different contracts state different requirements:

- Unit D (Office Technicians, clerks and Library Aides), unless the schedule change is mutually agreed to, 14 calendar day notice must be given.
- Unit B (Special Ed Aides, Ed Aides, Campus Aides, EEC Aides), 5 work day notice must be given.
- Unit S (School Admin. Asst., Plant Manager & Food Service Manager) “reasonable” notice must be given.

2. ANNUAL PERFORMANCE EVALUATION DATES

Due dates for annual performance evaluations of permanent employees are listed on Attachment 4. Failure to meet specified timelines may invalidate an evaluation. Evaluation forms are available on the Personnel Commission website. If you anticipate issuing an employee a below standard rating in any area, please make sure you are documenting and addressing the issues with the employee now. It is recommended that you issue the evaluations for this school year by *Friday, May 5, 2017 (Attachment #4)*.

3. TEACHER ASSISTANT: VERIFICATION OF ENROLLMENT AND UNITS COMPLETED IN COLLEGE COURSES

You should have already verified that Teacher Assistants (TA) have been continuously enrolled in and are successfully passing college coursework as a condition of employment. TAs submit verification of enrollment in the current (Spring) semester/quarter, as well as confirmation of units completed and passed in the Fall semester/quarter. Those who did not submit the required verification by the beginning of March must be terminated per the Unit F contract (**Attachment #5 - pg. 16**). Please note that course units for Non-Degree Track Teacher Assistants 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.

4. CLOSING OF TEACHER ASSISTANT POSITIONS AT END OF YEAR

The Unit F Contract must be followed when you close any Teacher Assistant positions (NOT Classified positions). There is an order of lay-off which is not based primarily on seniority, and you are not able to choose Non-Degree Track TAs over Degree Track TAs. It is advised that you obtain transcripts from TAs now, as you are checking for college units completed (#3 above), because the total number of completed college units will be needed to determine the order of lay-off. Report **HR085 TA Seniority** in BTS can assist with determining a TA’s seniority. This report is located on the School tab, seniority folder. Contact your Sr. Human Resources Representative for assistance (**Unit F, Article X (Reduction in Force)**). See **Attachment #6, Reduction in Force for Teacher Assistants**.

5. CAMPUS AIDES AND SCHOOL SUPERVISION AIDES

Campus Aides are Classified employees who are represented by SEIU, Local 99, and are part of Unit B (Instructional Aides). Campus Aides with permanent status have the same rights as other Unit B employees with regards to progressive discipline. Campus Aides with restricted status have limited rights, but still follow the guidelines of progressive discipline. Campus Aides may have “restricted” in their title, but that title does not relate to whether the Campus Aide is restricted. Please review BTS in the PA 20 screen to verify status, or contact your Assignment Technician in the Employment Transaction Services Branch for further information.

School Supervision Aides are Classified employees who are also represented by SEIU, Local 99, however, these employees are part of Unit G (Playground Aides). School Supervision Aides are temporary employees and do not have due process rights.

For specific questions regarding evaluation and discipline processes for Campus Aides and/or School Supervision Aides, please contact your Sr. HR Representative.

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

School Files Project Instructions



ATTACHMENT A

School Files Submission Form

Confidential and Attorney-Client Privilege

TO: General Counsel

FROM: _____, Principal/Supervisor

_____ School

DATE: _____

RE: Summary of Site File Review

Employee Name and Position: _____ Employee Number: _____

Alleged Victim(s) Name and Age at Time of Alleged Incident: _____

Type of Conduct (check all that apply):

☐ Sexual Misconduct
 ☐ Inappropriate Behavior
 ☐ Violence
 ☐ Drug-related

 Describe Alleged Incident (including dates): [Start typing here.]

 Describe Investigation/Administrative Action taken (incl. dates & any disciplinary action): Start typing here

 Other Comments: [Start typing here.]

Signed: _____

Date: _____

CC: Staff Relations

*Instructions: Please complete this cover memo **only** for those files you are reporting to Central Office. Scan and send as a pdf file this cover memo along with other pertinent documents from the employee file at issue to General Counsel via Staff Relations. You should send one pdf file that includes a single cover memo for an employee file (the single pdf file may include multiple incidents).*

School Files Application

April 3, 2017

Summary

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.

Document Requirements/Limitations

Users are to upload documents as **pdf** files. The size of each file selected for uploading is limited to **20MB**.

Users must enter the **8-digit** employee number (Entering leading zeroes) to verify the correct employee. The Cost Center Code (Current Work Location) will automatically populate once a valid employee number has been entered. The user can manually override the Cost Center (if required). The Cost Center is a 7-digit number and must be entered in order to upload a document. Users must also select the "Conduct Type" associated with the document using the drop-down list.

How to upload a document

1. Log-in to the application using your SSO account at: <https://schoolfiling.lausd.net>. The application is compatible with all major web browsers.
2. Enter **8-digit** employee ID number (add preceding zeros) for the individual who is the subject of the document being uploaded. Then click on the "Find Employee" button. Under "Employee Info" the employee name and currently assigned cost center will populate. Under "Upload Location" your cost center will populate. A message will appear in green below the search boxes validating the employee selection.
3. Proceed to the "Upload Employee School File" to the right. Click on the down arrow. You must choose the "Conduct Type" associated with the document using the drop-down list.
4. Click the "Browse..." button to attach PDF document. Choose the document to upload. Please note that only one document can be included per filing, but multiple related documents can be combined into one PDF.
5. After document is selected, the file name will appear. Select "Upload". You should receive a message in green at the bottom that says "File was uploaded successfully"
6. Documents you have uploaded will appear below, including the file you have just uploaded. You can also search for and view previously uploaded documents from your cost center.

Helpful Tips

1. Which Internet browser is preferred?

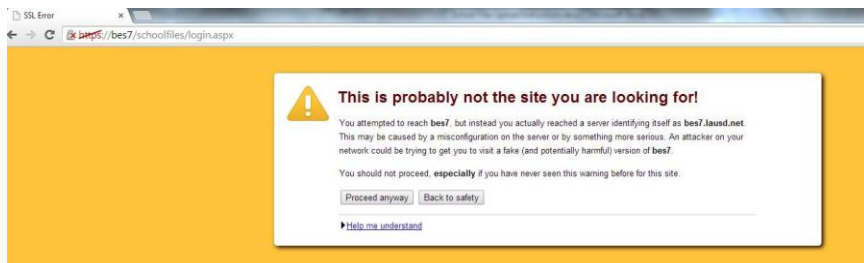
The application is compatible with all major web browsers (Internet Explorer, Chrome, and Firefox on a PC or Safari on a Mac), although the appearance of the application may vary slightly based on the browser.

2. I entered the Employee Number, but the application was unable to find the Employee Name

Verify the Employee Number is correct and contains 8- digits. (If required, precede less than 8- digits with leading zeroes)

3. I received the following messages. What should I do?

ATTACHMENT #1 Continued



Click **Proceed anyway**. The computer server that hosts the application does not have a certificate installed. The application resides on a computer located within ITD. It is safe to proceed.

School File Application – April 2017 updates

1) Log in with your single sign-on at: <https://schoolfiling.lausd.net>

The application is compatible with all major web browsers. Screen shots below are based on Internet Explorer. The appearance of the application may vary slightly in other browsers.

The screenshot shows the login page for the Los Angeles Unified School District School File Application. At the top is the district logo and name. Below is a header bar with the text "SCHOOL FILE APPLICATION". The main content area is titled "Login to School File Application". It contains a "Username:" field with a placeholder text: "Enter your Single Sign-On (email) username and password to Log In. e.g. (mmsmith@lausd.k12.ca.us, mary.smith@lausd.net) Do not add domain name (@lausd.k12.ca.us @lausd.net)". Below this is a "Password:" field and a "Login" button. A note states: "Session times out after 30 minutes. Note: Your Single Sign-On username and password is the same as your email username and password". At the bottom, there is a link for "Need Help? Click here for FAQ".

2) Enter **8-digit** employee ID number (add preceding zeros) for the individual who is the subject of the document being uploaded. Then click on the "Find Employee" button. The "Employee Info" with the employee name and assigned cost center will populate. Under "Upload Location" your cost center will populate.

The screenshot shows a form titled "Please enter Employee Number of School File". It has three main sections: "Employee Number" with a text input field and a red "X" icon, "Employee Info" with a text input field, and "Upload Location" with a dropdown menu showing "KING-DREW SH MD/S MG (1872701)". A red arrow points to the "Find Employee" button.

3) A message will appear in green below the search boxes validating the employee selection.

The screenshot shows the same form as before, but now the "Employee Number" field contains "00000000" and the "Find Employee" button is disabled. Below the form, a green message box states: "Employee No. [00000000] is Valid. You can Upload the Document Now".

ATTACHMENT #1 continued

4) Proceed to the “Upload Employee School File” to the right. Click on the down arrow. You must choose the “Conduct Type” associated with the document using the drop-down list.

The screenshot shows the 'Upload Employee School File' form. The 'Conduct Type Choice List' dropdown menu is open, displaying a list of options: Select, Sexual Misconduct involving minor, Sexual Misconduct involving adult, Violence, Attendance, Fraud, Alcohol/Drugs, Inappropriate language, Arrest/Conviction, Failure to Report Child Abuse, and Other Inappropriate Behavior. The 'Select' option is currently highlighted.

5) Click the “Browse...” button to locate the document on your computer to upload. NOTE: all documents must be PDFs.

The screenshot shows the 'Upload Employee School File' form. The 'Conduct Type Choice List' dropdown menu is now set to 'Inappropriate language'. The 'Browse...' button is highlighted with a red box, and the text 'No file selected.' is visible next to it.

6) After document is selected, the file name will appear. Select “Upload.” Please note that only one document can be included per filing, but multiple related documents can be combined into one PDF. You should receive a message in green at the bottom that says “File was uploaded successfully”

The screenshot shows the 'Upload Employee School File' form. The file name 'cc4988.PDF' is now displayed next to the 'Browse...' button. The 'Upload' button is highlighted with a red box. A red arrow points to the file name with the text 'File name will appear here'.

7) All documents uploaded for your school will appear below, including the file you have just uploaded. You can also search for and view previously uploaded documents.

The screenshot shows the search criteria and a table of uploaded documents. The search criteria include District, School List, Conduct Type, Employee No, and Date Range. The table has columns for File, Location, Uploaded By and Time, and Conduct Type.

File	Location	Uploaded By and Time	Conduct Type
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SUGGESTED TIME SEQUENCE
Elementary/Secondary Staffing
For 2017 – 2018

TASKS	SINGLE-TRACK	FOUR-TRACK
I. (a) +*Decision: Coordinator Position(s) in your School Plan (b) Selection of Coordinator(s) Election of Dean(s)	Month of March or prior to posting of Matrix	Month of March or prior to posting of Matrix
II. ** Election of Chapter Chair	Month of April	Month of April
III. (a) +***Post Matrix: Teachers Request Track, Grade level (elementary only), Department	Four weeks prior to selection	Four weeks prior to selection
IV. Contractual Date for Teacher Notification of Tentative Assignment	As soon as feasible, but not later than May 19	Not later than May 19 for Tracks A, B, C Not later than April 27 for Track D

+ 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 (at or before the end of the track, if applicable), but not later than 21 days before the teacher’s last scheduled work day.” **(Waiver to Amend Article IX-A, Section 2.0 (a))**

Refer to Article XXVII, Section 2.8 (d) for specific dates of the Local School Leadership Council elections.

MATRIX**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 to **track** or **grade level** opening on the basis of seniority. Appropriate credential should be considered for Special Education assignments.
2. The Collective Bargaining Agreement does not provide teachers the right to select specific instructional programs, student performance levels or instructional clustering of students.
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.
4. The site administrator **can and should make exceptions to the CBA provision** if he or she reasonably determines that the specific assignment is not in the best interest of the educational program.
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.
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

1. In secondary schools, Article IX-A, Section 2.0 d only provides teachers the right to **track** and **department** selection on the basis of recent experience/seniority.
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 Field Director in Staff Relations should you have specific questions.

**OFFICE OF STAFF RELATIONS
ANNUAL PERFORMANCE EVALUATION DUE DATES
SCHOOL BASED CLASSIFIED EMPLOYEES
2016 - 2017 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. It is recommended you issue the evaluation by **Friday, May 5, 2017** to meet the deadline. 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 17, 2017. 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, Housekeepers, Microcomputer Support Assistants, et al

Unit F – Teacher Assistants

Unit S – School Administrative Assistants, Food Service Managers, Plant Managers

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

Unit D – Office Technicians, Clerks, Library Aides

Unit G – School Supervision Aides, Community Representative

Note: It is recommended that employees' performance evaluations be consistent with the District's timeline as referenced in the above.

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:
 - Maintain continuous enrollment in college courses, completing at least one (1) course per semester/quarter.
 - Successfully complete 12 qualifying college semester/quarter units each school year (July 1 – June 30).
 - Submit acceptable evidence of enrollment at the beginning of each semester/quarter.
- (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 February 28, including:
 1. a. Form 503-103 "[Application for Issuance of TA Certificate](#)" 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 successful completion of courses (e.g. certified 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 30/February 28 deadlines.
- Keep completed 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.
- Post TA Seniority list with the number of qualifying college units for each TA by October 1/March 1 (Article X, Section 2.1).
- To release TAs who are out of compliance use the "[TA Notice of Failure to Meet Employment Standards](#)" PC Form 5330.

REDUCTION IN FORCE for TEACHER ASSISTANTS (Unit F, Article X)

Reduction in force for Teacher Assistants (TAs) is school-based, and based primarily on college units achieved rather than seniority. (This is different than for classified paraprofessional positions for which layoff is processed by the Classified Employment Services Branch and based on District seniority.)

Definition Reduction in force is when a TA position is eliminated entirely, as opposed to merely a reduction in hours for one or more positions

Seniority List **HR085 TA Seniority** is a report of TA Seniority available through BTS
(print out, add each employee's total number of completed college units next to his/her name, and post)

Reasons for Reduction in force

- Loss of budgetary support
- Changes in educational program
- Changes in services offered to student
- Changes in student population
- Returns from leave of absence

Order of layoff

- Possible termination of employees with less than one year seniority (administrative discretion)
- All employees with up to 5 years seniority are ranked by number of qualified college units achieved; employees with lowest number of units are laid off first
- If necessary, follow same procedure for employees with 5-10 years seniority, and then for those with more than 10 years seniority

Exemptions

TAs with special instructional skills or qualifications (such as computer, music, library, bilingual) may be exempted (See Article X, Section 2.3)

Written Notice

School must provide a written notice to employee at least **ten (10)** working days prior to effective date of layoff. Contact your Sr. HR Representative for assistance.

Recall Rights

- TAs with less than one year of service are considered terminated rather than laid off, and have no recall rights
- TAs with greater than one year seniority are reemployed to any open TA position at the school they were released from, in reverse order of the layoff within 12 months of the layoff **

Grievances

Only a violation of the procedure may be grieved, not the decision to lay off

* Prior service as a TA, IA, or Education Aide elsewhere can be given credit if it occurred immediately prior to date of hire in current classification of Teacher Assistant.

** School must develop and maintain recall list

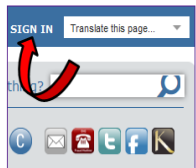
Visit the Staff Relations Website

<http://achieve.lausd.net/staffrelations>

Sign – in to access resources

Administrators Please Sign In

To access all areas of the Staff Relations website please [click here](#) or on the [SIGN IN](#) link above using your LAUSD Single Sign On.



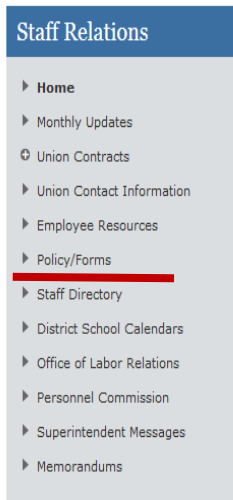
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Please enter your user name and password to continue

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Click on “**Policy/Forms**” to access bulletins, references guides, policy statements, etc. that are frequently referenced in conference memos.

Click on “**Resource Guide**” to for sample conference memos on attendance, classroom performance and conduct.

Click on “**Academic Year Checklist**” for a by month reminder of tasks and deadlines

If you are unable to access this website using your single sign-on (SSO), please contact Arlene Lyew-Teba in Staff Relations at (213) 241-6056 or arlene.lyew-teba@lausd.net.

2016-2017 STAFF RELATIONS
FIELD DIRECTOR and SR HR REP ASSIGNMENTS
Tel: (213) 241-6056 Fax: (213) 241-8405

BEAUDRY

	Name	Extension	EMAIL
Asst. Chief Human Resource Officer	FIGUEROA, Leticia	213-241-6056 213-241-5313	lcerv3@lausd.net
Administrator - AALA	Murphy, Kristen	213-241-8233	kristen.murphy@lausd.net
Field Director	Serrato, Frank	213-241-8243	fserrato@lausd.net
HR-SR Manager	Le Duff, Melinda	213-241-8253	melinda.leduff@lausd.net
Sr. HR Rep	Lorri Gossett	213-241-6864	lorri.gossett@lausd.net

LOCAL DISTRICT NORTHWEST

Field Director	Luna, Maribel	818-654-3641	maribel.luna@lausd.net
Shared Field Director	Irma Good (Thur/Fri) (interim)	818-654-3619	irma.good@lausd.net
Sr. HR Rep	Houston, Sarah	213-241-8240	sarah.houston@lausd.net

LOCAL DISTRICT NORTHEAST

Field Director	Olortegui, Brenda	818-252-5435	bolorteg@lausd.net
Shared Field Director	Irma Good (Mon/Wed) (interim)	818-252-5436	irma.good@lausd.net
Sr. HR Rep	Nunnally, Krishna	213-241-8242	krishna.nunnally@lausd.net

LOCAL DISTRICT CENTRAL

Field Director	Martinez, Isaias	213-241-0184	isaias.martinez@lausd.net
Shared Field Director	Moscoso, Veronica Mon/Tue	213-241-8257	vxm6767@lausd.net
Sr. HR Rep	Smith, Stacey	213-241 8227	stacey.smith@lausd.net

LOCAL DISTRICT EAST

Field Director	Cuevas, Susana	323-224-3353	scontr6@lausd.net
Shared Field Director	Moscoso, Veronica Wed/Thurs	323-224-3120	vxm6767@lausd.net
Sr. HR Rep	Kelly, Cathy	213-241-8248	cathy.kelly@lausd.net

LOCAL DISTRICT SOUTH

Field Director	Alfayate, Juan	310-354-3419	jalfayat@lausd.net
Shared Field Director	Oh, Sharon Wed/Thurs	310-354-3472	sharon.oh@lausd.net
Sr. HR Rep	Lyons, Terri Mon/Tue at LD Wed/Thurs/Fri at Beaudry	310-354-3400 213-241-2563	terri.lyons@lausd.net

LOCAL DISTRICT WEST

Field Director	Maxey, Eric	310-914 2153	ejm9800@lausd.net
Shared Field Director	Latham-Wilson, Madeline	310-914-2150	madeline.latham@lausd.net
Sr. HR Rep	Romero, Maria	213-241-6896	maria.romero@lausd.net

DIVISION OF ADULT & CAREER EDUCATION

Field Director	Foote, Jack	213-241-3725	djf2378@lausd.net
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