



ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7412

PAGE: 1 OF 11

CATEGORY: **Personnel, Classified Staff**

EFFECTIVE: **11-19-84**

SUBJECT: **Secretarial/Clerical Allocation Formula
for Regular Program School Sites**

REVISED: **3-20-06**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing classification and allocation of secretaries and clerks to elementary and secondary schools.
2. **Related Procedures:**

Application and examination of classified employees	7440
Assignment, general	7050
Classification of classified staff positions	7540
Eligible lists for employment and promotion of classified employees	7450
Position control	2025
Summer school classified staffing	7416
Transfer/reassignment of classified employees	7480
Workday and workweek for classified employees	7485

B. LEGAL AND POLICY BASIS

1. **Reference:** Board Policy I-5000; Employment Regulations for the Classified Service of the San Diego Unified School District.
2. *On January 13, 2004, the Board of Education approved a site-based budgeting process for unrestricted allocations at school sites. As a result, the secretarial/clerical allocation formula for regular program school sites is suspended.*
3. This procedure pertains to matters within the scope of collective bargaining. Contract language within specific collective bargaining agreements on this topic shall prevail over any language to the contrary in this procedure.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resource Services Division, Office of the Chief of Staff.
2. **Definitions**
 - a. **Adjusted enrollment:** Actual enrollment, as reported by the Pupil Accounting Unit, Budget Operations Department, Financial Operations Division, at the end of the fourth week of the traditional school year, modified by:

- (1) Adding 0.8 student for each student designated at the end of the fourth week of the first semester as a special day or gifted student, as in a program served by an itinerant teacher of the disabled, or as a nonresident student, and for each student designated by the Second Language Team in October of the current school year as limited English proficient (LEP).
- (2) Adding a percentage increase based on the *enter/withdrawal rate*. The enter/withdrawal rate for each school is a measure of student mobility determined by adding the number of enters and withdrawals during the prior school year, dividing by the February enrollment in the prior school year, and multiplying by 100 to obtain a rate per 100 students enrolled.

Enter/Withdrawal Rate		Percent Additive
	Less than 50.0	0%
50.0	- 65.9	5%
65.0	- 79.9	10%
80.0	- 94.9	15%
95.0	- 109.9	20%
110.0	- 120.9	25%
121.0	- 130.9	30%
131.0 or more		35%

- (3) Adding prekindergarten students for non-special education schools.
 - b. **Enrollment breakpoints:** Adjusted enrollment figures in the formula designated as points at which the total number of secretarial/clerkal formula positions authorized will change, or the school general secretary classification will change.
 - c. **Cushion:** An adjusted enrollment zone of 100 students (elementary schools) or 150 students (secondary schools) used in lowering staff classifications in periods of declining enrollments. "Starred rates" are not applied to salaries of secretaries and clerks until enrollment falls *below* the cushion zone for two consecutive years.
 - d. **Starred rate:** A higher salary placement authorized for a permanent employee reassigned to a lower salary class as a result of application of the formula (Procedure 7540 and appropriate salary schedule).
3. **Application of Formulas.** Human Resource Services Division is responsible for administering the secretarial/clerkal formulas specified in C.10.-15. *Increases* in the number of positions authorized or in the classification of School General Secretary,

Financial Clerk, or SIS Technician required by application of formulas are implemented as soon as possible. Salary increases justified through application of formulas based on adjusted enrollment figures will be backdated to the beginning of the school year. *Decreases* are implemented at the beginning of the semester, or earlier if vacancies occur or if personnel transfers are made which create necessary vacancies.

Exceptions :

- a. **Human Resource Services Division may elect to delay** for one additional semester the implementation of changes when adjusted enrollment falls into a higher or lower enrollment range of the formula by margins of less than 5 percent of adjusted enrollment specified in the formula, or 50 students, whichever is smaller.
- b. **Human Resource Services Division may elect to consider** authorized or *projected* enrollment rather than *actual* adjusted enrollment when determining action on pending vacancies and transfers.
- c. **Formula upgrade procedure**. School general secretaries and financial clerks are automatically moved to the higher classification. Upgrades involving Group 2 classifications (School Clerk I and School Library Technician I) to Group 3 classifications (School Clerk II and School Library Technician II) adhere to the following:
 - (1) If there are the *same number* of Group 3 openings as people in Group 2 positions, then all Group 2 employees are upgraded to Group 3 classifications.
 - (2) If there are *more* employees in Group 2 than positions to be upgraded to Group 3, the following guidelines apply:
 - (a) If a Group 2 employee at the site is on the higher classification eligible list, that employee receives an upgrade. (If more than one site employee is on the eligible list, ranking on the list is the determining factor.)
 - (b) When an eligibility list is not the factor, district seniority will be the determining factor.
 - (c) Vacancies in Group 2 do not involve automatic upgrades from Group 1. For promotion from Clerk Typist I or School Clerical Assistant to School Clerk I or School Library Technician I, the usual promotion rules for eligible lists will apply.

- d. **Decreases in classification** of School General Secretary and resulting decreases in other clerical staff classifications will not have an immediate effect on the salaries of permanent employees, who will be placed in “starred rate” status (C.2.d.). While in this status, an employee shall be required to accept any offered transfer or reassignment to a position in the higher class or risk forfeiture of his/her “starred rate” status. The Chief Human Resources Officer may grant an exception to this rule if, in his/her judgment, an employee’s reasons for nonacceptance of such a transfer or reassignment are reasonable.

After expiration of “starred rate” status, the incumbent of a downgraded position shall be eligible for a three-year period for transfer and promotion to any position in his/her earned higher classification without examination.

e. **Requests for job classification studies**

- (1) Principals may submit requests for job classification studies of school site clerical or secretarial formula positions based on the following conditions:
 - (a) The position(s) involved in the study is vacant.
 - (b) The principal identifies a site discretionary funding source (e.g., general funds, Targeted Instructional Improvement Grant [TIIG] funds, Title I funds) to cover the difference in the cost of the formula position and a position with a higher classification should the position study result in an upgrade. An existing vacant clerical position may also be used for this purpose. Private foundation grant awards are not an acceptable funding source.
 - (c) Provided the above-noted conditions are met, the principal completes a “Request for a Job Classification Study of a Vacant Formula Secretarial/Clerical Position” form, provides attachments (personnel action request for the current position vacancy and a school office organization chart); obtains approval signatures of the site budget analyst, site Assistant Superintendent and Deputy Superintendent as directed, and forwards the request and attachments to Human Resource Services Division for action.
- (2) The vacant position will be studied in accordance with district practices and procedures.
- (3) Whether the vacant position is determined to remain as currently classified or is reclassified to a higher job level, it will be filled in accordance with regular district personnel practices and procedures.

- (4) Should the vacant position be reclassified to a higher job level, the identified site discretionary funds will be encumbered and may not be used for another purpose.
 - (5) Funding sources will be monitored by the Budget Operations Department. Should funding cease to be available, the position will be eliminated in agreement with the applicable collective bargaining unit agreement, district procedures, and state law.
4. **Budget Operations Department**, Financial Operations Division, calculates adjusted enrollment for all schools and notifies the Human Resource Services Division.
5. **Human Resource Services Division**
 - a. **Certify candidates to fill vacancies** authorized by the Budget Operations Department on personnel action requests (Procedure 7450).
 - b. **Arrange transfers between school** of “starred rate” employees or employees in positions designated as excess under application of formulas.
 - c. **Administer “starred rate” procedures when** downward reclassification results from enrollment declines.
 - d. **Inform each school after** the fourth week of school of the total number of secretarial/clerical positions and classifications of School General Secretary authorized for that year, based on adjusted enrollment figures provided by the Budget Operations Department and application of appropriate formulas.
 - e. **Review and implement classification changes** from Clerk Typist I to School Clerical Assistant.
6. **Principal**
 - a. **Assign duties** (counseling, attendance, library, data processing) to secretarial/clerical staff within the latitude provided by C.13. and standard job class descriptions of the school district. Ensure that each employee has a copy his/her job description, understands duties to be performed, and knows who will supervise and evaluate performance.
 - b. **Ensure that each employee** performs work assignments appropriate to the job classification under which he/she is paid.

- c. **Select additional or replacement** secretarial/clerical personnel from the list of eligible employees certified by the Human Resource Services Division.
 - d. **Prepare personnel action requests** for replacements and reclassification and submit to the Human Resource Services Division.
 - e. **Approve request for reclassification** of Clerk Typist I to School Clerical Assistant after completion of two years of satisfactory service (Procedure 7540).
7. **Secondary Schools with Unusual Grade Configurations.** For purposes of this procedure, Gompers Secondary and SCPA are treated as high schools; Muir Alternative, Garfield, and Twain are treated as middle level schools. In addition to the clerical positions allotted based on their enrollments, Garfield and Twain shall also be allotted:
- a. **One-half (0.50) position** for attendance procedures.
 - b. **One-half (0.50) position** for each satellite for facility design.
8. **Multitrack Year-Round Schools.** All clerical positions in multitrack year-round schools will be 12-month positions. Multitrack year-round schools will be allocated an additional 0.50 clerical position above the allocation for a traditional school.
9. **Number of Positions Assigned to Schools**

Elementary Schools

Adjusted Enrollment	Total Positions
0 – 500	2.00
501 – 900	2.50
901 – 1,250	3.00
1,251 – 1,600	3.50
1,601 – 1,950	4.00
1,951 – 2,300	4.50
2,301 - 2,650	5.00

Middle Level Schools

Adjusted Enrollment	Total Positions	Adjusted Enrollment	Total Positions
0 – 750	5.00	1,926 – 2,125	8.50
751 – 925	5.50	2,126 – 2,325	9.00
926 – 1,125	6.00	2,326 – 2,525	9.50
1,126 – 1,325	6.50	2,526 – 2,725	10.00
1,326 – 1,525	7.00	2,726 – 2,925	10.50
1,526 – 1,725	7.50	2,926 – 3,125	11.00
1,726 – 1,925	8.00		

Senior High Schools

Adjusted Enrollment		Total Positions	Adjusted Enrollment		Total Positions
0	- 800	6.00	2,701	- 2,850	13.00
801	- 925	6.50	2,851	- 3,000	13.50
926	- 1,050	7.00	3,001	- 3,150	14.00
1,051	- 1,200	7.50	3,151	- 3,300	14.50
1,201	- 1,350	8.00	3,301	- 3,450	15.00
1,351	- 1,500	8.50	3,451	- 3,600	15.50
1,501	- 1,650	9.00	3,601	- 3,750	16.00
1,651	- 1,800	9.50	3,751	- 3,900	16.50
1,801	- 1,950	10.00	3,901	- 4,050	17.00
1,951	- 2,100	10.50	4,051	- 4,200	17.50
2,101	- 2,250	11.00	4,201	- 4,350	18.00
2,251	- 2,400	11.50	4,351	- 4,500	18.50
2,401	- 2,550	12.00	4,501	- 4,650	19.00
2,551	- 2,700	12.50			

10. Classification of School General Secretary

Adjusted Enrollment		Classification	Cushion	
0	- 600	School General Secretary I	501	- 600
601	- 1,400	School General Secretary II	1,251	- 1,400
1,401	- Up	School General Secretary III		

11. Classification of Financial Clerk

Type of School	Classification
Senior High Schools	Senior High Financial Clerk
Middle Level Schools	Middle Level Financial Clerk

12. Classification of Student Information Systems Technician (Secondary Only).

This position may be taken from either Group 1 or Group 2 formula allocations based on the "Total Positions Allocated" (C.13.).

Adjusted Enrollment		Classification
0	- 1,400	SIS Technician I
1,401	- Up	SIS Technician II

13. Allocation of Job Classifications Within Total Authorized Positions

School's General Secretary Classification	Total Positions Allotted†	Elementary			Middle Level			Senior High		
		Class./Salary/Level Group‡			Class./Salary Level Group‡			Class./Salary Level Group‡		
		1	2	3	1	2	3	1	2	3
I	2.00	1.00								
II	2.50	.50	1.00							
	3.00	1.00	1.00							
	3.50	1.50	1.00							
	4.00	2.00	1.00							
	4.50	1.50	2.00							
	5.00	2.00	2.00							
	5.50	2.50	2.00		.50	3.00				
	6.00				.50	3.50				
	6.50				1.00	3.50				
	7.00				1.00	4.00				
	8.50							1.50	2.00	3.00
	9.00							2.00	2.00	3.00
		Group‡			Group‡			Group‡		
		1	2	3	1	2	3	1	2	3
	9.50							2.50	2.00	3.00
III	2.50	.50	1.00							
	3.00	1.00	1.00							
	3.50	1.50	1.00							
	4.00	2.00	1.00							
	4.50	2.50	1.00							
	5.00	2.00	2.00							
	5.50	2.50	2.00							
	7.00				1.00	1.00	3.00			
	7.50				1.50	1.00	3.00			
	8.00				1.00	2.00	3.00			
	8.50				1.50	2.00	3.00			
	9.00				2.00	2.00	3.00			
	9.50				1.50	3.00	3.00	2.50	1.00	4.00
	10.00				2.00	3.00	3.00	3.00	1.00	4.00
	10.50				2.50	3.00	3.00	3.50	1.00	4.00
	11.00				3.00	3.00	3.00	3.00	2.00	4.00

School's General Secretary Classification	Total Positions Allotted†	Elementary	Middle Level	Senior High
		Class./Salary/Level	Class./Salary Level	Class./Salary Level
	11.50		3.50 3.00 3.00	3.50 2.00 4.00
	12.00		3.00 4.00 3.00	4.00 2.00 4.00
	12.50			4.50 2.00 4.00
	13.00			4.00 3.00 4.00
	13.50			4.50 3.00 4.00
	14.00			5.00 3.00 4.00
	14.50			4.50 4.00 4.00
	15.00			5.00 4.00 4.00
	15.50			5.50 4.00 4.00
	16.00			6.00 4.00 4.00
	16.50			5.50 4.00 5.00
	17.00			6.00 4.00 5.00
	17.50			6.50 4.00 5.00
	18.00			6.00 5.00 5.00
	18.50			6.50 5.00 5.00
	19.00			7.00 5.00 5.00
	19.50			7.50 5.00 5.00
	20.00			7.00 6.00 5.00

† “Total Positions Allotted” includes School General Secretary and Financial Clerk; these two positions are *not* included in the allocation of job classifications into Groups 1, 2, and 3.

‡ Group 1: Clerk Typist I; School Clerical Assistant
 Group 2: School Clerk I; School Library Technician I
 Group 3: School Clerk II; School Library Technician II
 SIS Technician. I and SIS Technician II may be taken from either Group 1 or Group 2.

Note: Senior high schools may use a “Group 1” position to employ an Administrative Assistant I, a media production specialist, or a network systems and media support technician. Middle level schools may use one “Group 1” position to employ a media production specialist or a network systems and media support technician.

14. Months of Clerical Service

- a. **Elementary schools.** In elementary schools the work year of the school general secretary shall be the same as that of the school principal except where mutually agreed otherwise.

- b. **Secondary schools.** The following formula is used for assignment of months beyond ten for clerical employees in secondary schools. These allocations represent the maximum number of extra months available for use by each school based on actual enrollment.

Middle Level				Senior High			
Enrollment		Months	Enrollment		Months		
0	– 1,000	2.00	0	– 1,500	3.0		
1,001	– 1,500	2.00	1,501	– 2,000	4.0		
1,501	– 2,000	3.00	2,001	– 2,500	5.0		
2,001	– 2,500	3.00	2,501	– 3,000	6.0		
2,501	– 3,000	4.00	3,001	– 3,500	7.0		

D. IMPLEMENTATION

1. **Budget Operations Department** informs the Human Resource Services Division of each school's total number of secretarial/clerical positions.
2. **Human Resource Services Division** determines classification of school general secretary authorized for that year, utilizing appropriate table in C.11. and exceptions noted in C.3.
3. **Increase in Total Authorized Positions or in Classification of School General Secretary**
 - a. **Principal** has personnel action requests prepared to implement changes and additions; submits to the Human Resource Services Division.
 - b. **Human Resource Services Division** suggests additional (certified) candidates to school to fill vacancies.
4. **Decrease in Total Authorized Positions Not Involving Reclassification of School General Secretary**
 - a. **Principal** adjusts assignments of present personnel.

- b. **Human Resource Services Division** determines excess employee(s) following guidelines in appropriate table (C.14.) and in Employment Regulations for the Classified Service of the San Diego Unified School District; reviews changes, determines timing, and arranges for transfer of excess employees(s) to other schools; coordinates transfer of excess employees.

5. Downward Reclassifications

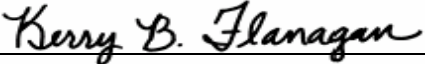
- a. **Principal** confers with the Human Resource Services Division to determine job classes and incumbents to be affected, following guidelines in appropriate table (C.14.) and Employment Regulations for the Classified Service of the San Diego Unified School District; notifies employees.
- b. **Human Resource Services Division** arranges for transfer of affected employees; determines effective date of changes; requests assignment authorization forms from principal, and coordinates transfer actions.
- c. **Payroll Unit, Payroll/Employee Benefits Department, Human Resource Services Division**, coordinates “starred rate” procedures when permanent employees are reclassified downward.

E. FORMS AND AUXILIARY REFERENCES

- 1. Request for a Job Classification Study Of A Vacant Formula Secretarial/Clerical Position form
- 2. Job class descriptions, available in the Human Resource Services Division
- 3. Personnel Action Request (PAR), available on web site.

F. REPORTS AND RECORDS

G. APPROVED BY



Chief of Staff, Kerry Flanagan
For the Superintendent of Schools