

ADMINISTRATIVE CIRCULAR NO. 25
Labor Relations Division

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: November 3, 2020

To: Office-Technical and Business Services (OTBS) Staff, Certificated Management, Classified Managers, and Non-Represented Management

Subject: CLASSIFIED OTBS STAFF WORKLOAD

Department and/or Persons Concerned: Office-Technical and Business Services (OTBS) Unit Members

References: Article 16.3, Office-Technical and Business Services (OTBS) Collective Bargaining Agreement

Action Requested: Review and Comply with Contractual Obligations & Considerations

Brief Explanation:

The San Diego Unified School District has continued to face some difficult budget challenges that have led to significant workforce reductions and numerous reassignments of critical support staff across the District. As we work through these transitions and changes, it is an appropriate time for principals and managers to assess and evaluate the workload of their classified support staff, discuss prioritization, and communicate expectations.

Contractual Obligations/Considerations

Pursuant to the Office-Technical and Business Services (OTBS) Collective Bargaining Agreement, Article 16.3, the following issues should be discussed with your existing and newly assigned OTBS staff at the start of the work year:

- **Job responsibilities.** Review the duties of the job classification and the specific duties assigned to the employee. Ensure assigned duties are consistent with those permitted within the job classification/position description document.
- **Prioritization of duties.** Provide the employee with information and direction about how to prioritize duties and responsibilities, and who to contact with questions about competing priorities and deadlines.
- **Expectations.** Discuss expectations for satisfactory performance and timelines for completion of work (when necessary).

- **Training.** Along with discussing duties, responsibilities, and expectations, solicit input from the employee regarding training needed to successfully meet the expectations and satisfactorily perform the duties of the position. Offer to provide the time/opportunity and encourage staff to attend training. Please visit the district's website <https://sandiegounified.truenorthlogic.com/U/P/Tab/Home> for a listing of available professional development and training opportunities for DWA applications such as PowerSchool, PeopleSoft HCM, and PeopleSoft Financial (and don't forget about the PeopleSoft job aids available on the District website - https://itd.sandiegounified.org/it_resources/people_soft).

Vacation Considerations

In instances where scheduling and taking vacation time may be difficult to manage for both the employee and the supervisor, Labor Relations and Human Resources provide some suggestions for managers and principals to closely monitor and manage vacation balances with employees:

- In order to provide a balanced and equitable approach to managing vacation approvals, work with employees to identify and submit vacation plans at the start of their work year for the entire year, knowing that individual needs arise outside of advanced planning.
- Consider prioritizing requests around those with balances that exceed the district maximum accrual.
- Continue to monitor throughout the year to ensure employees will remain below the 328 hours when August 31st arrives. **Please note:** Employees with a vacation balance higher than 328 hours as of August 31 of each year will be paid the difference between their balance and the 328, which is an expense that will be paid from your department or site account.

Additional Considerations

A few other areas to note going into the school year are the below:

- **Overtime and extra time.** Management should ensure all employees understand that overtime and extra time opportunities require prior supervisory approval.
- **Volunteers and contract work.** The use of volunteers or contract work has always been limited; however, in consideration of the recent reductions in force, it is necessary to ensure that the use of volunteers and contracting out is limited to work that is *not* usually and customarily performed by bargaining unit members.

Questions regarding the above should be directed to Human Resources or Labor Relations:

Human Resources			
HRO Area 1	Mary Wager	mwager@sandi.net	(619) 724-7409
HRO Area 2	Ryan Leighty	rleighty@sandi.net	(619) 725-7258
HRO Area 3	Ann Cato	acato@sandi.net	(619) 725-8070
HRO Area 4	Cara Marshall	cramsey@sandi.net	(619) 725-7239
HRO Area 5	Stephanie Kennedy	skennedy1@sandi.net	(619) 725-7053
HRO High Schools	Josue Diaz	jdiaz6@sandi.net	(619) 725-8062
HRO Area 7	Litta Buras	lburas@sandi.net	(619) 725-7324

Labor Relations			
Director	Kristie Jones	kjones5@sandi.net	(619) 725-8138
Labor Relations Specialist	Adrianna McGinley	amcginley@sandi.net	(619) 725-8178

APPROVED:

/s/

Jessica Falk Michelli

Executive Director, Labor Relations & Assistant General Counsel

JFM:bb

Attachment: Attachment 1 – Classified OTBS Staff Workload Memo