



Santa Barbara SCHOOL DISTRICTS

Section 2
01/15/10 Board Brief

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Date: November 13, 2009

To: Dr. J. Brian Sarvis, Superintendent

From: Dr. Kristine L. Robertson, Director, Personnel
Meg Jette, Director, Fiscal Services
Elaine Alvarado, Coordinator, Classified Personnel

Subject: **Report on Streamlining Steps for Initiating Positions from the Personnel and Payroll Departments**

Background

During the 2008-2009 school year the Personnel and Fiscal Services departments met to identify an improved process for expediting and accounting for all staff in the district within our personnel and business office systems. We identified the major concerns and as a collaborative effort, identified a process and the steps needed to implement our plan. Part of the process was to hire two Position Control staff, one in Personnel and one in Accounting, who would work closely together to make sure all employees, new or otherwise, were appropriately assigned to positions in Magic (personnel, accounting and payroll program system). Immediately, these two positions made for a tighter more efficient process.

We then implemented the new paperwork flow process and provided training for all site secretaries and principals for 2009-2010. This created unforeseen complexities for all sites as well as the district personnel and fiscal services departments. We continue to meet to identify and fix the issues and concerns that have become apparent over the last six (6) months.

Plan

The Personnel and Fiscal Services Department will continue to revise, improve and streamline the process for more efficiency and effectiveness in the future. The documents provided in this report identify our recommended plan of action. Attached is a flow chart demonstrating the current steps in the process, a document outlining the problems we have encountered, and the recommendations for addressing these issues and streamlining the process. We are also researching agenda templates through the California State Board Association Agenda Online website for suggested revisions to our current personnel list for board action.

Attachment(s)?	<input checked="" type="checkbox"/>	Yes (if so, please attach)	<input type="checkbox"/>	No	<input type="checkbox"/>	Powerpoint	<input type="checkbox"/>	Overhead	<input type="checkbox"/>	Consultant
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Areas of Concern

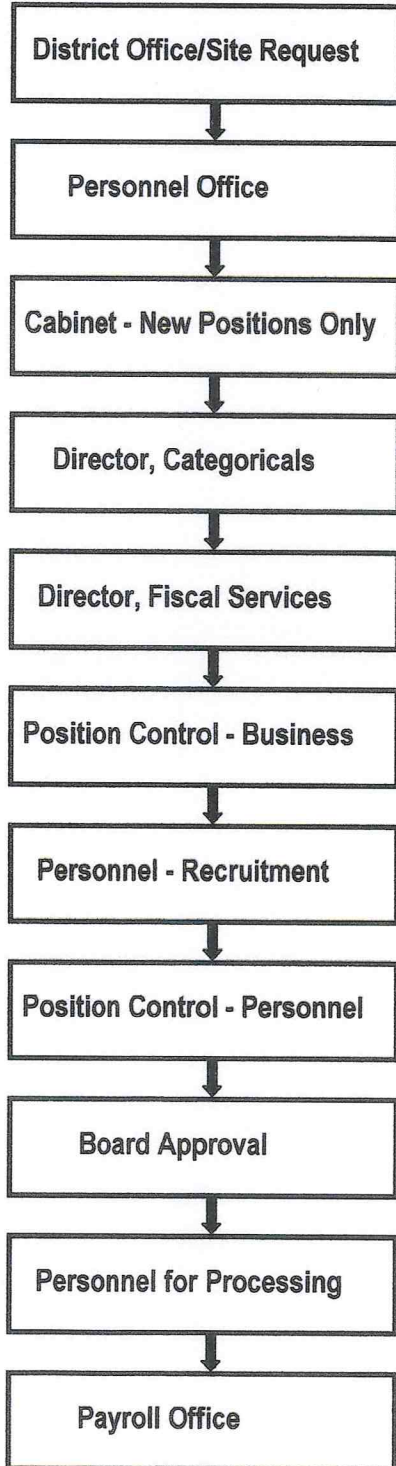
- presenting all actions to the board when we already have an approved budget covering most positions
- orchestrating a culture change that has asked others to do things differently
- struggling to meet timelines due to the amount of extra paperwork created
- implementation timeline was problematic as the changes put unnecessary pressure on all staff
- implementing too many changes proved to be complex
- changing the deadline date for submitting board agenda paperwork to Superintendent's office
- deadlines for submitting board report information is not in line with the payroll cycle
- integrity of budget data provided was questioned
- paperwork is delayed at the sites or in someone's office downtown awaiting signature(s)
- sites not turning paperwork into personnel before payroll cut off dates to initiate stipends, co-curricular, premium pay, hourly pay and employment agreements
- paperwork submitted to personnel department is not always complete, or has incorrect information or is missing approval signatures requiring personnel staff to stop the process and contact the sites to get all needed information to expedite the process
- timecards for substitutes and other hourly employees are not being turned in on time

Recommended Actions for Resolution of Concerns

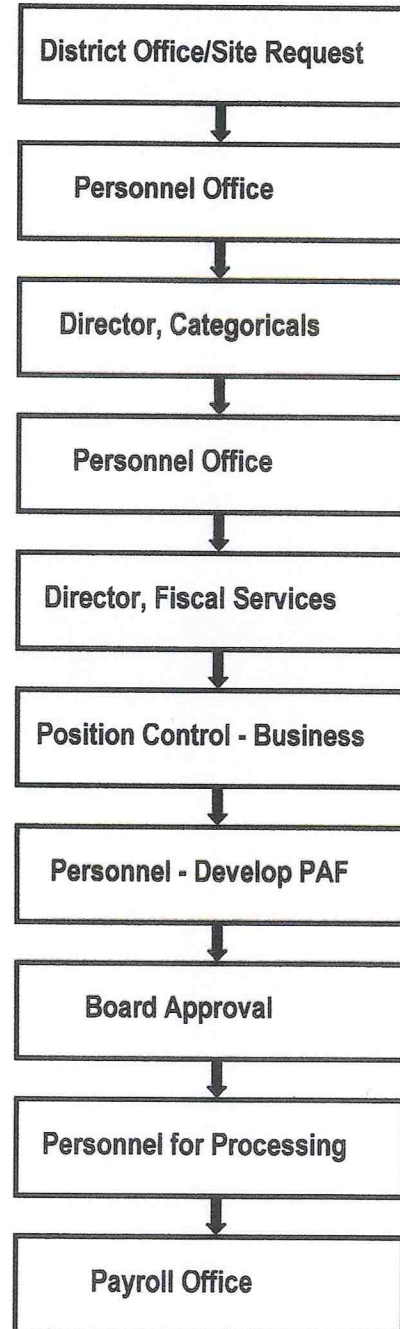
- modify and streamline the board approval process
- revise the board list showing appointments only for previously approved budgeted positions
- personnel action list will only provide specific information on those items not already budgeted for the year, i.e. transfers, promotions, terminations, changes of status, leaves, etc.
- develop a more streamlined handbook for training site staff each year
- all times cards to be submitted by hourly and substitute employees instead of by the sites
- new handbook to be reviewed by a committee made up of site clerical, principals, and district office staff prior to implementation
- provide timely notification to all staff reinforcing deadlines for turning in all documentation for the payroll cycle and board lists
- continue to meet as needed to monitor, assess and analyze the process and allow for on-going improvements to our procedures.
- review the California State Board Association Agenda Online templates and propose a new format for board consideration

Steps for Personnel/Payroll Processes

New Positions Replacement Positions

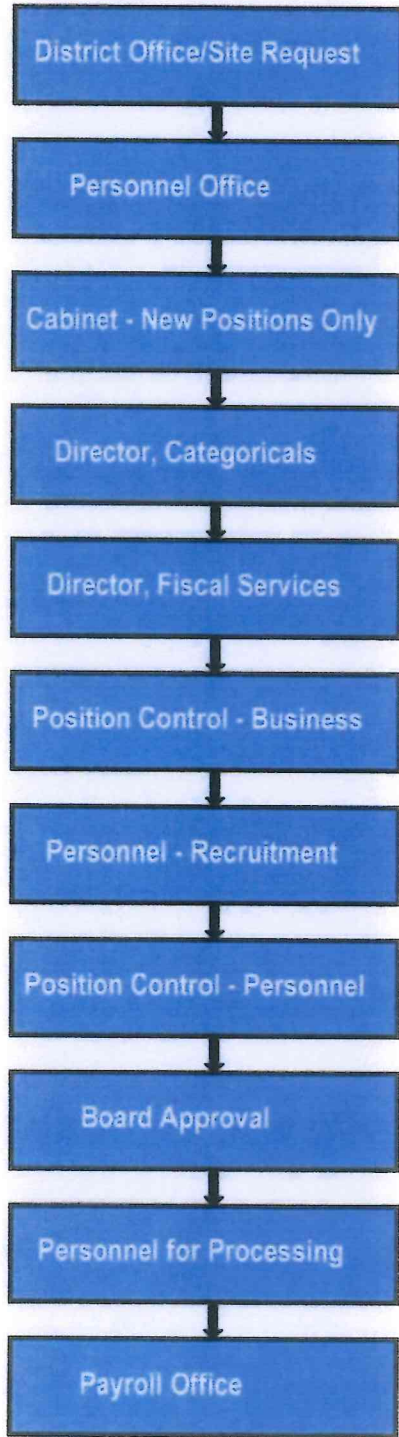


Employment Agreements Co-Curricular Stipends/Premium Pay



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