



San Diego Unified School District

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FINANCIAL OPERATIONS DIVISION
Michael M. Price
Principal on Special Assignment

MEMORANDUM

TO: Site Principals
FROM: M. Price via G. Rayburn
DATE: July 16, 2007
SUBJECT: **REVISED Budget and Staffing Rules for 2007-08**

The following set of "rules" has been established to assist principals and Central Office departments in supporting the staffing allocation, master scheduling, and budgeting processes for the 2007-2008 school year.

A. Budgeting Procedures

1. Sites will be allocated staffing based on a 1% low range enrollment forecast. This allocation strategy enables Finance Operations and school sites to plan staffing with a minimal amount of last minute staff movement.
2. Staff will be allocated on the basis of "enrolled only" not on the potential of growth in the future. This mostly affects elementary school sites between the monthly enrollment checks.
3. Elementary sites will not be surveyed for requests for over-formula teachers. Requests coming to the attention of the Budget Analyst or Area Superintendent will be evaluated by an independent retired elementary principal and will only be considered if the site has followed all of the staffing procedures outlined below. The retired administrator will consider special circumstances that are supported by historical trend data.
4. Sites that incur negative balances in one year will have those balances rolled over into the next year and will have their allocations reduced by the negative balance in order to "repay" the district for the loan of funds.
5. Principals will "purchase" staff in the Unrestricted (00010) resource using the average salary. Principals will "purchase" staff in all restricted resources using the actual salary of the employee. If specific employees that will be funded from the restricted resources are "unknown" at the time of the workbook submission the principal should budget at the district average salary. This average salary may or may not cover the actual cost of the employee that is eventually assigned and adjustments will be made in the fall.
6. Sites cannot declare a vacancy. Sites must contact the HR staffing administrator with a description of the uncovered assignment. HR will attempt to staff with a contract employee. If no contract employee is available, HR will inform the Budget Analyst who will contact the school site with the appropriate charge code for a Visiting Teacher for the vacancy.
7. Sites will not be able to utilize projected carry-over dollars to fund monthly or hourly positions in the 2007-08 budgeting process. Carry-over dollars will only be utilized in the fall after those balances have been calculated and verified.

8. Sites will be funded and will "purchase" staff and supplies based on formulas that incorporate the current required reductions for budget balancing. Staff and supplies will be allocated at the percentage reduced amounts and sites will purchase at the actual average cost.

B. Staffing and Scheduling Procedures

1. Sites will build their master schedules using the district accepted class size formulas for all grade levels: K-3 (20:1), grades 4-6 (34:1), grades 7-12 (35:1).
2. Elementary sites need to use general fund (Resource 00000/00010) resources to fund their K-3 classrooms first, followed by their 4-6 classrooms. Additional staffing from restricted or unrestricted sources may then be applied to 4-6 Class Size Reduction. Any staff allocation remaining from restricted funds at that time may be allocated to certificated support staff (Resource Teachers, etc.). Combination classes are appropriate for inclusion into scheduling schemes but 3-4 combinations should be avoided for staffing reasons.
3. Second Language dollars must be applied to Bilingual classroom/class concerns first in the areas of teachers for these classrooms.
4. GATE Seminar classes must be staffed at 20:1 (Secondary and Elementary) Seminar classes in excess of 25 students require a waiver from the GATE office BEFORE including the class into the course list or master schedule. [Subject to BOE Modification]
5. Site funded GATE Seminar classes should be scheduled at the regular classroom load for the grade level of students in the class, Grades 4-6 is 34:1 and Grades 7-12 is 35:1.
6. General fund staffing allocations (Resource 00000/00010) may not be used to fund Resource Teachers.
7. Any site Resource Teacher, regardless of funding resource, must, by Board of Education direction, spend a minimum of 50% of their time working directly with students.
8. School Master Schedules and Class Lists will be audited by Budget for inappropriately placed and staffed certificated positions and personnel using the Zangle software system.
9. Year-round school sites are responsible for the payment of all assignments that take staff members into the next fiscal year even if the staff member is leaving the site for the following school year.

C. Human Resources Procedures

1. Elementary site class lists and secondary site master schedules will be audited during the summer to ensure that certificated staff members that have been excessed from the sites have not been given a classroom assignment at the school site.
2. Sites will provide their best staffing needs information to Human Resources by the posted deadlines in order to provide for contract stipulated Post and Bid procedures to occur in the appropriate timeframes.

D. General Practices

1. A retired elementary principal or team of principals will be hired to be the arbitration official(s) for the granting of any over formula teachers to elementary school sites.
2. Budget and Human Resources departments will jointly develop a schedule of all of the components of the 2007-2008 Budget and Staffing process.
3. Fourth Friday enrollments will be the benchmark for all staffing decisions. Enrollment drops after the fourth Friday of the year will be investigated by Pupil Accounting and any indications of inappropriate recordkeeping will be reported as appropriate to the district's Ethics Officer and/or the Area/Assistant Superintendent for possible disciplinary action. Site funding will be immediately adjusted to reflect the correct ADA numbers.

- PARS →
4. High performing, historically stable enrollment schools will be asked to complete their staffing alignments within 10 days of the beginning of the school year.
 5. All sites will be expected to have classroom assignments or Master Schedule changes completed by the end of the fourth week of the school year. Principals will need to monitor

enrollment figures and begin making changes during the second week of school when the open enrollment period for all CHOICE programs closes.

E. Calendar of Events

1. The following calendar should be utilized by school sites for planning purposes:

a. January

- i. Release of Initial Human Resources Information to sites January 3
 - ii. Budget workbooks are released to the sites January 24
 - iii. Budget Workshops and Assistance Sessions begin January 25
 - iv. Certificated Staffing information due to Human Resources January 26
- For Post and Bid Only**

b. February

- i. Certificated Post and Bid Opens February 9
- ii. Certificated Staffing Adjustments (Excess) Due to HR February 16
- iii. Classified Staffing Layoff and Bumping Workshop February 22
- iv. Classified Layoff PeopleSoft Open Lab February 23
- v. Certificated Post and Bid Closes February 26
- vi. Classified Staffing Layoff and Bumping Workshop February 27
- vii. Classified Staffing Information due to HR February 28

c. March

- i. Budget Workbooks are due to Budget Operations March 2

d. May

- i. Second Round of Post and Bid available to District staff

e. July

- i. Site vacancies known as a result of post-bid/retirements/resignations
- ii. Site Master Schedules reviewed for appropriate personnel

f. August

- i. Human Resources works to fill identified vacancies
- ii. Teachers report to duty—Opening class lists and Master Schedules
- iii. Over-Formula Staffing Administrator(s) comes on duty

g. September

- i. 7th --- First Monday —Open Choice Enrollment Period Closes
- ii. 14th --- Second Friday --- Staff Changes planned based on enrollment
- iii. 21st --- Fourth Friday – **Site CERTIFICATED** staffing changes completed
- iv. 28th --- Fourth Friday – Official Site Enrollment Count Date

h. October

- i. 5th -- Fifth Friday – **Site CERTIFICATED PARS** completed and submitted
- ii. 5th -- Fifth Friday – Official District Enrollment published to sites
- iii. 12th -- Sixth Friday – Human Resources aligns staff based on site changes