



San Diego Unified School District

EUGENE BRUCKER EDUCATION CENTER
4100 Normal Street, Room 3209 San Diego, CA 92103-2682

(619) 725-7610
Fax: (619) 725-7528
E-Mail: grayburn@ sandi.net

BUDGET OPERATIONS DEPARTMENT
Gamy Rayburn
Budget Operations Director

MEMORANDUM

TO: Area/Assistant Superintendents
FROM: B. Brooks and J. Liddell
DATE: September 17, 2007
SUBJECT: PROCESS FOR REQUESTING OVER-FORMULA POSITIONS

The district has instituted a new process this year for approving over-formula positions. Site principals and area/assistant superintendents received a memorandum from Mike Price dated July 16, 2007, outlining the process for requesting over-formula positions via the Over-Formula Review Panel. We have been assigned as the panel to review requests and to determine whether or not an additional position should be approved. We would like to highlight a few of the major points of the process put in place to be objective and fair and to reduce the number of over-formula positions.

Last year, the procedure called for principals to submit requests for over-formula positions directly to their area/assistant superintendents. According to the memorandum from Mike Price, area/assistant superintendents were to then discuss the request with Budget Operations and jointly agree whether an over-formula position should be approved. This procedure did not have the desired result of reducing the number of over-formula positions at school sites.

To standardize the procedure this year, a new process will be used. The following steps are to be followed.

- Site principal reviews the July 16, 2007, memorandum from M. Price via G. Rayburn, "Revised Budget and Staffing Rules for 2007-2008," (copy attached) with special attention to Section B: "Staffing and Scheduling Procedures" and the July 16, 2007, memorandum, also from Mike Price, "Over-Formula Teacher Independent Study Panel" (copy attached) with attention to "Criteria for Placement."
- If special conditions warrant, principal contacts his/her area/assistant superintendent and discusses the need and rationale for an over-formula position.
- If the area/assistant superintendent agrees that the request is valid after ensuring that all other options have been explored, he/she provides site with Over-Formula Request for Credentialed Position—School form.
- Site principal completes form and returns it to area/assistant superintendent.

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- Area/assistant superintendent reviews form. If request is valid and area/assistant superintendent supports the request, he/she completes Over-Formula Request for Credentialed Position—Area/Assistant Superintendent form and forwards completed form to Nancy McClure, School Operations Budget Supervisor.
- Budget analyst attaches needed back-up materials (enrollment information, staffing allocations, budget information, etc.) to form and forwards it to Over-Formula Review Panel.
- Panel reviews information provided and consults with appropriate district personnel, if needed, and makes a decision regarding approval/disapproval of request.
- Panel completes Over-Formula Request for Credentialed Position—Over-Formula Review Panel form and sends copies to area/assistant superintendent, budget specialists, and certificated staffing administrator for the school.
- Area/assistant superintendent informs site of decision.
- If position is approved, principal contacts certificated staffing administrator. Certificated staffing administrator will contact appropriate budget analyst.
- Panel maintains record of decisions.

We appreciate the effort everyone will be making to ensure an objective review process and the best use of district resources.

BB/JML

Enc. (5)

c: C. Cohn
Fiscal Executive Committee
W. Kowba
N. McClure
G. Rayburn