



Personnel Commission
AGENDA OF REGULAR MEETING
Wednesday, June 12, 2019 - 5:30 P.M.
Site 18, Room 125
37230 37th Street East, Palmdale, CA 93550

CALL TO ORDER

PLEDGE OF ALLEGIANCE

ROLL CALL: Mr. Don Wilson, Chairperson
Mrs. Deneese Thompson, Vice Chairperson
Mrs. Kathleen Duren, Commissioner
Ms. Mary Theus, Interim Director, Personnel Commission

I. PRELIMINARY BUSINESS

ACTION

A. Approval of Regular Meeting Minutes – May 22, 2019

73-18/19

II. PUBLIC COMMENTS

- A. Comments Concerning Items on the Agenda
- B. Comments from Members of the General Public Regarding Non-Agenda Items

III. CONSENT AGENDA

Actions proposed for the Consent Agenda are items consistent with adopted rules and regulations of the Personnel Commission and are deemed routine in nature. They will be acted upon in one motion, without discussion, unless members of the Personnel Commission, staff, or a member in the audience requests an items removal. The item will be removed from the motion to approve and will be discussed immediately following the Consent Agenda.

ACTION

- A. Approval of Consent Agenda
 - 1. Ratification of Eligibility Lists
 - 2. Nullification of Eligibility Lists
 - 3. Ratification of Transfers

74-18/19

IV. UNFINISHED BUSINESS

None

V. NEW BUSINESS

ACTION

- A. Approval of Eligibility List with Less Than Three Ranks:
Occupational Therapist
- B. Approval of Annual Software License Renewals 2019-2020
NEOGOV Insight Enterprise and Biddle Consulting (OPAC)
- C. Approval of Software License Renewal:
NEOGOV Onboard 2019-2020
- D. Approval of 2019-2020 Agreement for Legal Services:
Fagen Friedman & Fulfrost LLP
- E. Approval of Membership Renewal 2019-2020: CSPCA
(California Personnel Commissioners Association)

75-18/19

76-18/19

77-18/19

78-18/19

79-18/19

- | | |
|--|----------|
| F. Approval of Revision to Job Description Transportation Technician | 80-18/19 |
| G. Approval of Revision to Job Description Senior Payroll Clerk | 81-18/19 |
| H. Approval of Revision to Job Description Facilities Planning Technician | 82-18/19 |
| I. Approval of Revision to Job Description Executive Assistant Non-Confidential | 83-18/19 |

VI. INFORMATION/REPORTS

INFO

- A. Selection status for Director, Personnel Commission
- B. Expenses Review
- C. Classified Update
- D. Interim Director, Personnel Commission
- E. Comments from Commissioners

VII. RECESS TO CLOSED SESSION

- A. With respect to every item of business to be discussed in closed session, pursuant to Government Code, Section 54957
 - 1. Confidential/Personnel Matters

VIII. RECONVENE TO OPEN SESSION

IX. REPORT OUT ACTIONS TAKEN (if any) IN CLOSED SESSION

- A. With respect to every item of business to be discussed in closed session, pursuant to Government Code, Section 54957
 - 1. Confidential/Personnel Matters

X. DATE/TIME OF NEXT REGULAR PERSONNEL COMMISSION MEETING: June 26, 2019, at 5:30 P.M.

OPEN SESSION ADJOURNMENT _____ P.M.

Personnel Commission Meeting
of the
Palmdale School District

Minutes of May 22, 2019 Scheduled Meeting

| | |
|--|---|
| CALL TO ORDER | Vice Chairperson Deneese Thompson called the meeting to order at 5:36 p.m., followed by the Pledge of Allegiance led by Mrs. Duren. |
| MEMBERS PRESENT | Mr. Don Wilson, Chairperson Mrs. Deneese Thompson, Vice Chairperson |
| MEMBERS ABSENT | Mrs. Kathleen Duren A quorum was present. |
| STAFF PRESENT | Ms. Mary Theus, Interim Director, Personnel Commission Mrs. Susan McCormick, Administrative Secretary |
| PRELIMINARY BUSINESS | Mrs. Thompson moved to approve the minutes of the May 08, 2019, meeting, with Mr. Wilson providing a second, and discussion was called for. Hearing none, Mr. Wilson called for the vote and the motion carried with a 2-0 vote: Thompson – Aye; Wilson – Aye. |
| PUBLIC COMMENTS CONCERNING AGENDA ITEMS | None. |
| PUBLIC COMMENTS CONCERNING NON-AGENDA ITEMS | Michael Breen, IT Technician, addressed the Commission regarding the selection process for the Systems Administrator position. Ms. Theus will research his concerns and respond. |
| CONSENT AGENDA | Mrs. Thompson moved to approve the Consent Agenda as presented, with Mr. Wilson providing a second. Motion carried with a 2-0 vote: Thompson – Aye; Wilson – Aye. |
| UNFINISHED BUSINESS | None. |
| NEW BUSINESS | Approval of 2019-2020 Personnel Commission Meeting Dates: Mrs. Thompson moved to approve the schedule of meeting dates, with Mr. Wilson providing a second, and discussion was called for. Hearing none, Mr. Wilson called for the vote and the motion carried with a 2-0 vote: Thompson – Aye; Wilson – Aye. |

INFORMATION/REPORTS

Classified Update

Ms. Theus distributed the Classified Update.

Interim Director, Personnel Commission

Ms. Theus reported on the Renaissance Model being implemented to build a new culture at the Tamarisk campus. A new principal has been selected and classified transfer applications will be collected from May 28 – June 03, 2019. Ms. Theus also shared the dates for the 2020 CSPCA Conference, which will be held in San Francisco.

Comments from Commissioners

Mr. Wilson shared praise for the District's retirement dinner.

RECESS TO CLOSED SESSION

Recess to closed session at 5:47 P.M.

- A. With respect to every item of business to be discussed in closed session, pursuant to Government Code Section 54957
 - 1. Confidential Employment Matters

RECONVENE TO OPEN SESSION

Reconvened to open session at 6:20 P.M.

REPORT OUT OF CLOSED SESSION

With no action taken, there is no report.

NEXT MEETING

The next regular meeting of the Personnel Commission is scheduled for June 12, 2019 at 5:30 P.M. in Room 125 at Site 18.

ADJOURNMENT

On a motion by Mrs. Thompson, the meeting was adjourned at 6:20 P.M.

Respectfully submitted,



Mary Theus

Interim Director, Personnel Commission

APPROVED:

Don Wilson, Chairperson

Deneese Thompson, Vice Chairperson

Kathleen Duren, Commissioner

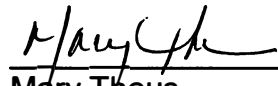
**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
June 12, 2019**

CLASSIFIED RECRUITMENT SUMMARY REPORT

| Job Classification | Open Date | Close Date | Written Exam Date | QAI Date | Number of Applicants | Number Passed MQs | Number Passed Written | Passed Performance | Number Passed QAI | Number Eligible | Effective Date | Expiration Date | Merged *Yes/No | Total # of Ranks |
|------------------------------------|-----------|------------|----------------------|----------|----------------------|-------------------|-----------------------|--------------------|-------------------|-----------------|----------------|-----------------|----------------|------------------|
| Bilingual Administrative Secretary | 03/19/19 | 04/10/19 | 05/14/19 05/23/19 | 06/04/19 | 71 | 40 | 11 | 13 | 11 | 11 | 06/05/19 | 06/04/20 | *Yes | 10 |
| Director, Personnel Commission | 04/15/19 | 05/15/19 | 05/17/19 | 05/22/19 | 11 | 3 | 3 | NA | 3 | 3 | 05/22/19 | 05/21/20 | No | 3 |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

This certifies the eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.



Mary Theus
Interim Director, Personnel Commission

6/6/19

Date

AGENDA ITEM

MT: smc
74-18/19

TRANSFERS AND REASSIGNMENTS

| | <u>Employee Name</u> | <u>Effective Date</u> | <u>Classification(s)</u> | <u>Comments</u> |
|----|-----------------------|-----------------------|---|--|
| a. | Anthony, Marques B. | 04/29/19 | Noon Duty/Campus Assistant, 3.5 hrs/182 days, from (DC) to (ECE-TW) | Growth, Involuntary transfer |
| b. | Anthony, Marques B. | 05/14/19 | Noon Duty/Campus Assistant, 3.5 hrs/182 days, from (ECE) to (DW) | Replacement for Terrace Elster, Involuntary Transfer |
| c. | Barriga, Susan | 04/25/19 | From Administrative Clerk II, 8.0 hrs/12 mos (Risk Mgmt), to Bilingual Administrative Clerk II, 8.0 hrs/12 mos (SpEd) | Return to former classification |
| d. | Borquez, Gilbert C. | 05/01/19 | From Maintenance Worker II (M & O) 8.0 hrs/12 mos, to Maintenance Worker II-Certified (M & O) 8.0 hrs/12 mos | Contractor License |
| e. | Burgos, Monique | 05/17/19 | From Child Nutrition Assistant I (LA), 3.0hrs/182 days) to Instructional Assistant I (MZ) 5.75 hrs/182 days | Replacement for Mercy De La O, Voluntary Demotion |
| f. | Cazarez Torres, Nancy | 05/20/19 | Instructional Assistant I, 5.75 hrs/182 days, from (TA) to (OC) | Replacement for Terrance Stokes, Voluntary Transfer |
| g. | Colmenero, Brian | 05/16/19 | Special Education Instructional Assistant I (YU), 5.75 hrs/ 182 days | Growth, Reassignment within same site; elimination of position |
| h. | Hines, Marybeth | 04/24/19 | Transportation Technician, 8.0 hrs/12 mo, from Special Ed/Student Svcs to Transportation Svcs | Growth, Reassignment; elimination of position |
| i. | Morvant, Cheri | 05/15/19 | From Child Nutrition Assistant I (LA) 3.0 hrs/182 days, to Instructional Assistant I (SW) 5.75 hrs/182 days | Growth, Voluntary Demotion |
| j. | Ramos, Roxanne | 05/16/19 | Instructional Assistant I, 5.75 hrs/182 days, from (TA) to (CM) | Growth, Voluntary Transfer |
| k. | White, Kiah | 05/01/19 | Paraeducator-Moderate to Severe from 5.75 hrs/182 days (PDC) to 7.0 hrs/182 days (YN) | Replacement for B. Patrice Evans, Increase in hours by seniority |

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE: June 12, 2019 REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Interim Director, Personnel Commission

RE: APPROVAL OF ELIGIBILITY LIST WITH LESS THAN THREE RANKS:
Occupational Therapist

BACKGROUND

A primary function of the Personnel Commission is to recruit and select qualified candidates for employment with the District based on the merit system. Through the selection process, candidates are tested and ranked on the basis of their overall knowledge, skills, and abilities.

STATUS

Recruitment efforts for the classification of Occupational Therapist are challenging. This is a position that is posted continuously and difficult to fill because of the minimum qualifications.

To support the Special Education needs of the District, it is requested that an eligibility list be approved when a qualified candidate is identified.

RECOMMENDATION

It is recommended that the Personnel Commission approve the eligibility list for Occupational Therapist with one eligible.


**PALMDALE SCHOOL DISTRICT
PERSONNEL COMMISSION
June 12, 2019**

CLASSIFIED RECRUITMENT SUMMARY REPORT

| Job Classification | Open Date | Close Date | Written Exam Date | QAI Date | Number of Applicants | Number Passed MQs | Number Passed Written | Passed Performance | Number Passed QAI | Number Eligible | Effective Date | Expiration Date | Merged *Yes/No | Total # of Ranks |
|------------------------|-----------|------------|-------------------|----------|----------------------|-------------------|-----------------------|--------------------|-------------------|-----------------|----------------|-----------------|----------------|------------------|
| Occupational Therapist | 07/09/18 | Continuous | NA | 05/31/19 | 1 | 1 | NA | NA | 1 | 1 | 05/31/19 | 05/30/20 | *Yes | 2 |
| | | | | | | | | | | | | | | |

*Only new eligibles have the expiration date of the merged eligibility list; previous eligibles maintain the original expiration date.

This certifies the eligibility list process is complete and in compliance with pertinent Education Codes (merit system) and Personnel Commission Rules and Regulations.



Mary Theus
Interim Director, Personnel Commission

6/6/19

Date



Quote

Governmentjobs.com, Inc.
300 Continental Blvd
Suite 565
El Segundo CA 90245

Bill To

Vicki Galli
Palmdale USD, (CA)
39139 North 10th Street East
Palmdale CA 93550
United States

Date 7/1/2019
Number SO12211
Due Date
Terms Net 30
P.O. No.

Description

Insight Enterprise Software License - \$27,132.53

Period Covered

8/1/2019 - 7/31/2020

Total \$27,132.53

Start Date

End Date



Quote

Governmentjobs.com, Inc.
300 Continental Blvd
Suite 565
El Segundo CA 90245

Bill To
Vicki Galli
Palmdale USD, (CA)
39139 North 10th Street East
Palmdale CA 93550
United States

Date 6/30/2019
Number SO11200

Due Date
Terms Net 30
P.O. No.

Description
Biddle Software License - \$2,761.00

Period Covered
7/31/2019 - 7/30/2020

Total \$2,761.00

Start Date

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE June 12, 2019 _____ REPORT

TO: Personnel Commission X ACTION

FROM: Mary Theus
Interim Director, Personnel Commission

RE: APPROVAL OF SOFTWARE LICENSE RENEWAL:
NEOGOV Onboard 2019-2020

BACKGROUND

The Onboard module for the NEOGOV Applicant Tracking System provides automation for the pre-employment process of new employee orientation. The module streamlines the process and auto assigns forms for completion online with digital signature.

STATUS

The 2019-2020 renewal rate for the NEOGOV Onboard software license plus customer support shows a 7% increase from last year's rate. The expense was projected in the annual Personnel Commission budget for 2019-2020.

RECOMMENDATION

It is recommended that the Personnel Commission approve the expense to renew the software license for the NEOGOV Onboard module.



Quote

Governmentjobs.com, Inc.
300 Continental Blvd
Suite 565
El Segundo CA 90245

Bill To

Vicki Galli
Palmdale USD, (CA)
39139 North 10th Street East
Palmdale CA 93550
United States

Date 6/17/2019
Number SO11182

Due Date
Terms Net 30
P.O. No.

Description

Onboard Software License - \$9,475.60

Period Covered

7/17/2019 - 7/16/2020

-

Total \$9,475.60

Start Date

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE June 12, 2019 X REPORT

TO: Personnel Commission ACTION

FROM: Mary Theus
Interim Director, Personnel Commission

RE: APPROVAL OF 2019-2020 AGREEMENT FOR LEGAL SERVICES -
FAGEN FRIEDMAN & FULFROST LLP

BACKGROUND

Mr. Jay Fernow of the law firm of Fagen Friedman & Fulfrost LLP, has served as the primary legal counsel for the Personnel Commission for many years. Expenses for the scope of services have been estimated and approved on the 2019-2020 budget. The District has continued to pay the legal expenses to provide the Personnel Commission legal counsel.

STATUS

The Agreement for Legal Services and Professional Rate Schedule to retain the services of Fagen Friedman & Fulfrost for legal counsel during the 2019-2020 school year is attached for review.

RECOMMENDATION

It is recommended that the Personnel Commission approve the Agreement for Legal Services with Fagen Friedman & Fulfrost LLP, as presented.



AGREEMENT FOR LEGAL SERVICES

This agreement is by and between Palmdale School District Personnel Commission ("Client") and the law firm of Fagen Friedman & Fulfroft LLP ("Attorney"). In consideration of the promises and the mutual agreements hereinafter contained, Attorney agrees to provide legal services to Client on the terms set forth below effective July 1, 2019 through June 30, 2020:

1. CONDITIONS. This Agreement will not take effect, and Attorney will have no obligation to provide legal services, until Client returns a signed copy of this Agreement.

2. SCOPE OF SERVICES. Client hires Attorney as its legal representative/counsel with respect to matters Client specifically refers to Attorney. Attorney will provide those legal services reasonably required to represent Client. Attorney will take reasonable steps to keep Client informed of progress and to respond to Client's inquiries.

3. CLIENT'S DUTIES. Client agrees to cooperate with Attorney and to communicate with candor while keeping the Attorney apprised of any information or developments which may come to Client's attention, to abide by this Agreement, to pay Attorney's bills on time and to keep Attorney advised of Client's address and telephone number. Client will assist Attorney in providing information and documents necessary for the representation in the described matter.

4. CONSULTANT SERVICES. Attorney may provide consulting services in addition to or in support of the legal services provided pursuant to this Agreement, through qualified non-attorney Communication Services and Education Consultants. These services are intended to support Client with communications work or educational consultant services related to labor and employment matters, special education and student matters, high-profile litigation and settlement agreements, in addition to employee, community, inter-governmental and media relations.

5. EMAIL COMMUNICATIONS/CLOUD-BASED COMPUTING. In order to provide Client with efficient and convenient legal services, Attorney will frequently communicate and transmit documents using e-mail. In addition, Attorney uses a cloud computing service with servers located in a facility other than Attorney's office. Most of Attorney's electronic data, including emails and documents, are stored in this manner. Although Attorney will take reasonable precautions to keep email and other electronic data confidential and secure, because technology and cyber threats continue to evolve, there may be risks communicating and storing electronic data in this manner, including risks related to confidentiality and security. By entering into this Agreement, Client is consenting to such e-mail transmissions with Client and Client's representatives and agents, as well as to having communications, documents and electronic data pertinent to Client's matter(s) stored through a cloud-based service.

6. LEGAL FEES AND BILLING PRACTICES. Client agrees to pay by the hour, in minimum units of one tenth (.1) of an hour, at Attorney's prevailing rates for all time spent on Client's matter by Attorney's legal personnel. Current hourly rates are noted in an attached rate schedule and the actual rate billed is based on the attorney's number of years of experience.

The rates on this schedule are subject to change on 30 days' written notice to client. If Client declines to pay any increased rates, Attorney will have the right to withdraw as Attorney for Client. The time charged will include the time Attorney spends on telephone calls relating to Client's matter, including calls with Client and other parties and attorneys. The legal personnel assigned to Client's matter may confer among themselves about the matter, as required and appropriate. When they do confer, each person will charge for the time expended, as long as the work done is

reasonably necessary and not duplicative. Likewise, if more than one of the legal personnel attends a meeting or other proceeding, each will charge for the time spent.

7. COSTS AND OTHER CHARGES. (a) Attorney will incur various costs and expenses in performing legal services under this Agreement. Except as otherwise stated, Client agrees to pay for all costs, disbursements and expenses in addition to the hourly fees. These include fees fixed by law or assessed by public agencies, messenger and other delivery fees, out of office copying/reproduction costs, and travel costs (including mileage charged at the standard IRS rate, parking, transportation, meals and hotel costs, if applicable), and other similar items. The following costs shall not be charged:

| | |
|--------------------------------------|-----------|
| In office Photocopying | No Charge |
| Facsimile Charges | No Charge |
| Postage | No Charge |
| On-line Legal Research Subscriptions | No Charge |
| Administrative Overhead | No Charge |

(b) Out of town travel. Client agrees to pay transportation, meals, lodging and all other costs of any necessary out-of-town travel by law firm personnel. Client will also be charged the hourly rates for the time legal personnel spend traveling.

(c) Consultants and Investigators. To aid in the representation in Client's matter, it may become necessary to hire consultants or investigators. Client agrees to pay such fees and charges.

8. BILLING STATEMENTS. Attorney will send Client monthly statements for fees and costs incurred. Each statement will be payable within thirty (30) days of its mailing date. An interest charge of one percent (1%) per month shall be assessed on balances that are more than thirty (30) days past due. Client may request a statement at intervals of less than 30 days. If Client requests a bill, Attorney will provide one within 10 days. The statements shall include the amount, rate, basis of calculation or other method of determination of the fees and costs, which costs will be clearly identified by item and amount.

9. DISCHARGE AND WITHDRAWAL. Client may discharge Attorney at any time. Attorney may withdraw with Client's consent, for good cause or as allowed or required by law upon ten (10) days written notice. Good cause includes Client's breach of this Agreement, refusal to cooperate or to follow Attorney's advice on a material matter or any fact or circumstance that would render Attorney's continuing representation unlawful or unethical. When Attorney's services conclude, all unpaid charges will immediately become due and payable. Following the conclusion of Attorney's representation of Client, Attorney will, upon Client's request, deliver to Client the Client file(s) and property in Attorney's possession, whether or not Client has paid for all services. If Client has not requested delivery of the files, Attorney may destroy all such files in its possession seven (7) years after the conclusion of the representation.

10. DISCLAIMER OF GUARANTEE AND ESTIMATES. Nothing in this Agreement and nothing in Attorney's statements to Client will be construed as a promise or guarantee about the outcome of the matter. Attorney makes no such promises or guarantees. Attorney's comments about the outcome of the matter are expressions of opinion only. Actual fees may vary from estimates given.

11. ENTIRE AGREEMENT. This Agreement contains the entire agreement of the parties. No other agreement, statement, or promise made on or before the effective date of this Agreement will be binding on the parties.

12. MODIFICATION BY SUBSEQUENT AGREEMENT. This Agreement may be modified by subsequent agreement of the parties only by an instrument in writing signed by both of them or an oral agreement only to the extent that the parties carry it out.

13. SEVERABILITY IN EVENT OF PARTIAL INVALIDITY. If any provision of this Agreement is held in whole or in part to be unenforceable for any reason, the remainder of that provision and of the entire Agreement will be severable and remain in effect.

14. MEDIATION CLAUSE. If a dispute arises out of or relating to any aspect of this Agreement between the Client and Attorney, or the breach thereof, and if the dispute cannot be settled through negotiation, Attorney and Client agree to use mediation before resorting to arbitration, litigation, or any other dispute resolution procedure.

15. EFFECTIVE DATE. This Agreement will govern all legal services performed by Attorney on behalf of Client commencing with the date Attorney first performed services. The date at the beginning of this Agreement is for reference only. Even if this Agreement does not take effect, Client will be obligated to pay Attorney the reasonable value of any services Attorney may have performed for Client.

THE PARTIES HAVE READ AND UNDERSTOOD THE FOREGOING TERMS AND AGREE TO THEM AS OF THE DATE ATTORNEY FIRST PROVIDED SERVICES. THE CLIENT SHALL RECEIVE A FULLY EXECUTED DUPLICATE OF THIS AGREEMENT.

IN WITNESS WHEREOF, the parties have signed this Agreement for Legal Services.

Palmdale School District Personnel
Commission

Fagen Friedman & Fulfrost LLP

Type or Print Name

Chris Keeler

Name

Type or Print Title

Managing Partner

Title

District Authorized Signature



Signature

DATE: _____

DATE: March 11, 2019



Fagen Friedman & Fulfroft LLP

PROFESSIONAL RATE SCHEDULE

**Palmdale School District Personnel Commission
July 1, 2019 through June 30, 2020**

1. HOURLY PROFESSIONAL RATES

Client agrees to pay Attorney by the following standard hourly rate:

| | |
|--|------------------------|
| Associate | \$230 - \$260 per hour |
| Partner | \$290 - \$325 per hour |
| Of-Counsel | \$325 per hour |
| Paralegal/Law Clerk | \$150 - \$210 per hour |
| Paralegal/Law Clerk (<i>Bar Admitted Outside CA</i>) | \$230 per hour |
| Education Consultant | \$240 per hour |
| Communication Services Consultant | \$260 per hour |

Travel time shall be charged only from the attorney's nearest office to the destination and shall be prorated if the assigned attorney travels for two or more clients on the same trip. If Client requests a specific attorney, Client agrees to pay for all travel time of that specific attorney in connection with the matter.

2. ON-SITE LEGAL SERVICES

At Client's discretion and by prior arrangement of Client and Attorney, Attorney may provide regularly scheduled on-site legal services ("Office Hours") to address legal issues that may arise in Client's day-to-day operations. Office Hours, which include time Attorney spends at Client's facility as well as travel time, shall be provided at a reduced hourly rate of 90% of the Attorney's standard hourly rate.

3. COSTS AND EXPENSES

| | |
|--------------------------------------|-------------------|
| In office Photocopying | No Charge |
| Facsimile Charges | No Charge |
| Postage | No Charge |
| On-line Legal Research Subscriptions | No Charge |
| Administrative Overhead | No Charge |
| Mileage | IRS Standard Rate |

Other costs, such as messenger, meals, and lodging shall be charged on an actual and necessary basis.



California School Personnel Commissioners Association
Supporting Education Through Merit

Annual Association Dues Invoice

Invoice # 58-2019-20

Date: April, 2019

| Bill To: | Send Payment To: |
|--|--|
| Palmdale ESD 37230 37 th St. Palmdale, CA 93550 Director: Mary Theus-Interim mltheus@palmdalesd.org Ph. (661) 285-2902 Fax (661) 285-2137 | CSPCA Treasurer Matt Spencer 79080 Shadow Trail La Quinta, CA 92253 spencermatt@outlook.com Ph. 760-899-6418 |

Please pay by check payable to CSPCA and include a copy of this invoice.

| Dues Year | Number of Classified Employees | Dues Amount |
|-----------|--------------------------------|-------------|
| 2019-20 | 1145 | \$1,200.00 |

Please update any information for your district or Personnel Commissioners so we may update our records.

| | Board Appointee | Employee Appointee | Joint Appointee |
|----------------|-----------------|--------------------|------------------|
| Name | Don Wilson | Kathleen Duren | Deneese Thompson |
| Year Appointed | 2017 | 2014 | 2015 |

Thank you for your continued membership with CSPCA.

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE June 12, 2019 _____ REPORT

TO: Personnel Commission _____ X ACTION

FROM: Mary Theus
Interim Director, Personnel Commission

RE: APPROVAL OF REVISION TO JOB DESCRIPTION – TRANSPORTATION TECHNICIAN
CONSIDER SALARY SCHEDULE PLACEMENT FOR APPROVAL

BACKGROUND

A job description for Transportation Technician was developed to support transportation operations, and assist with routing and scheduling demands. It has not been revised for several years.

STATUS

Revision to the job description has been recommended in order to more accurately reflect the current duties of the position. Salary schedule placement remains unchanged at Range 27.

As per CSEA's request, the District is advising the Commission of CSEA's recommendation for salary placement at Range 32.

RECOMMENDATION

It is recommended that the Personnel Commission approve revision to the job description for Transportation Technician, and confirm/approve salary schedule placement.

TRANSPORTATION TECHNICIAN

Bargaining Unit: Classified

SALARY RANGE

\$3,367.87 - \$4,092.40 Monthly

DEFINITION:

~~To work with District special education department to help determine appropriate transportation for students. To perform a variety of responsible technical video camera duties and responsibilities involved in the installation, removal and viewing of video tapes. To aid Director in bus routing and scheduling as required.~~

The job of Transportation Technician is done for the purpose of providing support to the educational process with specific responsibilities for monitoring the support systems required to meet the transportation operation scheduling demands; providing resource information from a variety of sources; collecting and referring information relating to transportation system operations; and maintaining services within established guidelines and standards.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Director of Transportation or designee.

~~EXAMPLE OF DUTIES:~~ ESSENTIAL DUTIES:

Duties ~~may~~ include, but are not limited to, the following:

1. Assist Director or designee in routing and scheduling of bus fleet; plans, monitors and maintains route schedules.
- ~~2. Plans and maintains route schedules for special education students~~
2. Confers with school officials and parents and for appropriate transportation of special education students.
- ~~3. Install video equipment such as cameras and LED bars, adjust housings, remove cameras and view tapes.~~
- ~~4. Transfer 8mm film to VHS tapes for school site viewing and files.~~
- ~~5. Develop and maintain video files for each school site.~~
- ~~6. Verify and review tapes for conformance with established regulations and driver procedures. Maintain filing system necessary to assist drivers on discipline problems.~~
3. Utilize two-way radio to inform, direct, or alert Director or designee of drivers of pertinent information.
- ~~4. Assist Director or designee in routing and scheduling of bus fleet as needed.~~

PROPOSED REVISION

Personnel Commission Regular Meeting 06/12/2019

4. Maintains a **variety of files on student conduct reports, driver files, BSR's and home-to-school routes, and records (e.g. conduct reports, student rosters, Bus Service Requests (BSRs), route descriptions, etc.) for the purpose of providing an up to date reference.**
5. Perform a variety of general clerical duties ~~as needed; answer questions and provide information;~~ assist with phones and take messages.
6. **Responds to a variety of inquiries (e.g. staff, parents, etc.) for the purpose of resolving problems, providing information and/or referring to appropriate personnel.**
7. **Perform other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.**

QUALIFICATIONS:

Knowledge of:

1. Pertinent sections of local, ~~and state, and federal~~ laws governing the transportation of ~~Special Education~~ students (Title 13 **California Code of Regulations of Administration Code**).
2. Must know general condition and locations of roads, highways, loading areas and procedures for ~~special education~~ students; special education terms, general characteristics of exceptionalities and recommendations for, and basic **principles** ~~principals~~ of behavior management.
3. Principles, rules, regulations, and procedures involved in pupil transportation.
4. Basic record keeping practices.
5. ~~Understand and carry out oral and written directions.~~
6. ~~Establish and maintain cooperative working relationships with those contacted in the course of work. Respond calmly and effectively in emergency situations.~~

Ability to:

1. Relate to parents, school personnel, public, ~~and bus drivers, and Crossing Guards.~~
2. ~~Represent the school district in an IEP session or other meetings dealing with the development or modification plan for a special education student.~~
2. Work independently in the absence of supervision.
3. **Communicate effectively, both orally and in writing; understand and carry out oral and written directions.**
4. **Establish and maintain cooperative relationships with those contacted in the course of work.**
5. **Respond calmly and effectively in emergency situations.**

EXPERIENCE AND EDUCATION:

Any combination of **school transportation** experience and training that would likely provide thorough knowledge of driving safety and courtesy; thorough knowledge of the operation of automobiles and buses; thorough knowledge of local streets and routes and all applicable laws and regulations of school bus operation.

PROPOSED REVISION

Experience:

~~One~~ **Two** years school bus driver experience ~~including knowledge of local streets and routes.~~

Training:

Equivalent to completion of twelfth grade.

LICENSE AND CERTIFICATIONS:

Possession of an appropriate, valid **California** driver's license.

Possession of an appropriate, valid California driver's license prior to the completion of the probationary period.

Ability to be covered under the District property/liability insurance.

SENIOR PAYROLL CLERK TECHNICIAN

Bargaining Unit: Classified

CURRENT SALARY SCHEDULE PLACEMENT

Range 38 (\$4,420.00 - \$5,375.07) Monthly

PROPOSED SALARY SCHEDULE PLACEMENT

Range 40 (\$4,643.60 - \$5,645.47) Monthly

DEFINITION:

~~To lead and participate in the responsible clerical accounting duties and responsibilities involved in the preparation, processing and maintenance of the district's payrolls; and to prepare and maintain appropriate accounts involving posting and balancing.~~

Perform a variety of advanced technical payroll accounting activities including establish, analyze, audit, reconcile and maintain manual and automated financial and payroll records necessary to ensure District employees are paid in an accurate and timely manner. Perform complex payroll calculations and processes, verify and update records while maintaining the integrity of various payroll data.

SUPERVISION RECEIVED AND EXERCISED:

~~Receives general supervision from the Deputy Superintendent, or designee.~~

~~Exercises functional and technical supervision over lower level clerical accounting staff.~~

Receives general supervision from the Fiscal Services Administrator, or designee.

The Senior Payroll Technician will assist in training and provide guidance to assigned personnel.

EXAMPLE OF ESSENTIAL DUTIES:

MAJOR DUTIES AND RESPONSIBILITIES:

- ~~1. Serve as lead worker; plan, prioritize, assign provide functional and technical supervision, and review the work of staff involved in payroll and benefit duties.~~ Serve as a lead resource to payroll personnel, including support to process outstanding payrolls, assist in training and implementation of new procedures for the purpose of enhancing productivity and ensuring all department outcomes are achieved.
- ~~2. Participate in the selection of staff; provide or coordinate staff training; work with employees to correct deficiencies.~~ Coordinate auditing, recordkeeping and reporting functions to assure proper application, calculation and reporting of compensation data, benefits and taxes; participate in the coding and application of voluntary deductions; assure proper authorizing signatures, coding and accuracy of payroll adjustments to ensure provider payments are timely.

PROPOSED REVISION

Personnel Commission Regular Meeting 06/12/2019

3. ~~Calculate and process payroll for certificated and/or classified regular staff and substitutes; receive, check and process timecards and time sheets; prepare, check and balance time reports; prepare supplemental time reports; compute salary rates and payroll adjustments.~~ Review and process employee time sheets and timecards for regular and supplemental payrolls; calculate and input time information, pay rates, salary adjustments and overtime pay; verify proper authorizing signatures, coding, calculations and accuracy of payroll adjustments; request and obtain signatures and additional information as needed. Calculate, assemble, match, code, sort, review, verify and post a variety of payroll data such as hours, tax information, leave, days worked and work assignment; balance, reconcile and input payrolls for check processing; identify and resolve payroll issues and discrepancies; and assure accuracy and completeness of input and output data.
4. ~~Maintain employee payroll files; update employee salary, credentials, time worked, time missed, and location on District computer systems; submit changes in employee status to county; terminate and purge files for former employees.~~ Review and audit payroll data, records and reports for accuracy and completeness; compare and reconcile forms, statements, records, reports, lists, spreadsheets, time cards and other financial documents; identify errors and make appropriate corrections and adjustments.
5. ~~Maintain records of individual earnings, sick leave, vacation, and other allowances and their use; compute sick leave allowances; process and verify employee attendance and time worked reports.~~ Process a variety of special payroll transactions such as retroactive pay, garnishments, and lost warrants and overtime; follow up on and resolve outstanding warrants or warrant cancellations.
6. ~~Provide information and assistance to new employees; provide employees with necessary forms; answer questions regarding payroll and personnel procedures, programs and changes in status.~~ Assure that employee retirement and voluntary deduction information is accurately maintained and payment to providers are accurate and timely.
7. ~~Receive and verify payroll warrants by amount, name and pay location; coordinate and maintain the list of staff for each school for warrant distribution; coordinate distribution of pay warrants.~~ Prepare and reconcile comprehensive Federal and State quarterly and annual reports of earnings, tax withholding, unemployment insurance, social security, retirement for W2 reporting, Department of Labor, Bureau of Labor Statistics and various other accounts for state and federal agencies. Coordinate the distribution and processing of annual W2 forms.
8. ~~Verify employment, both in writing and by telephone.~~ Generate computerized lists and reports; ensure payroll timelines are met, maintain payroll controls; research, respond to inquiries and assure proper procedures, policies, rules and regulations are applied to payroll activities.
9. ~~Prepare worksheets for Federal and State taxes; submit warrant requests for Federal and State taxes; reconcile and submit tax reports.~~ Establish and maintain detailed permanent payroll records for District personnel; process and update records with pay rates, contributions, tax withholdings, tax shelter annuities, vacation and sick

PROPOSED REVISION

leave, payroll deductions, including union dues and retirement and other data and information.

- ~~10. Perform a variety of general clerical duties; type correspondence, letters, memoranda, reports, and other materials.~~ Maintain the integrity of tables in the District's payroll database, update and upload employee leaves into District's (LACOE's) database.
- ~~11. Operate office machines including typewriters, photocopiers, telephones, 10-key adding machine, and word processing equipment.~~ Coordinate, document and maintain current knowledge of laws, including Labor, State and Federal, together with code rules, regulations and pending legislature related to payroll functions; assist with modifying systems and activities to meet requirements.
- ~~12. Update salary projections used for budget projections and collective bargaining negotiations.~~ Interact closely with Benefits, Human Resources, Budgeting and other departments to assure all information regarding payroll adjustments, discrepancies, employment status, and salary accounts are up to date and accurate.
- ~~13. Perform related duties as assigned.~~ Participate in unit meetings, in-service training, workshops, etc. for the purpose of conveying and/or gathering information required to perform job functions.
- 14. Serve as an informational resource to all district employees concerning assigned payroll functions; respond to inquiries and provide detailed information concerning related salaries, deductions, leave, taxes, paychecks, transactions, issues, practices, policies and procedures; assist with new hires.**
- 15. Operate a variety of office equipment including a calculator, copier, fax machine, scanner, computer and assigned software.**
- 16. Perform other duties and functions as assigned that support the overall objective of the position (on demand work).**

QUALIFICATIONS:

Knowledge of:

- ~~1. Principles of lead supervision and training.~~ The practices and terminology of payroll accounting principles, clerical and office procedures and methods, business mathematics and record keeping.
- ~~2. Pertinent federal, state and local laws, codes and regulations.~~ Payroll policies and procedures, together with applicable Federal, State and local laws, rules regulations, codes and/or statutes related to payroll.
- ~~3. Principles and procedures of financial record keeping and reporting.~~ Tax withholding, voluntary deductions and employee benefits
- ~~4. Modern office procedures, methods and computer equipment.~~ Spreadsheet and word processing software, data control procedures and data entry operations.
- ~~5. Principles, practices and procedures of bookkeeping.~~ Labor and other contracts to properly interpret and calculate salaries.
- ~~6. Basic mathematical principles used in bookkeeping and financial record keeping.~~ Preparation of financial statements, comprehensive accounting, and statistical recordkeeping techniques.
- 7. Verification and processing of payroll records and reports.**
- 8. Modern office practices, procedures, equipment and assigned computer software.**

PROPOSED REVISION

Ability to:

1. ~~Provide technical and functional supervision and training to assigned staff.~~ Enter data onto standardized formats within computerized data base programs using keyboards, basic keyboarding or 10-key skills and calculators.
2. ~~Understand, interpret and apply principles, laws and procedures related to payroll preparation and processing.~~ Learn and apply laws, codes governing payroll and retirement in California, as well as policies, procedures, and labor contracts used by the District.
3. ~~Accurately maintain records and files and prepare reports.~~ Prepare clear, complete and concise financial payroll records and reports.
4. ~~Perform machine posting and arithmetic computations rapidly and accurately.~~ Perform technical research, complete complex arithmetic computations and prepare reports.
5. ~~Operate a variety of office equipment including a typewriter, computer, adding and calculating machines.~~ Use a range of personal computer software such as spreadsheets, word processing, and databases.
6. ~~Type at a speed necessary for successful job performance.~~ Ensure confidentiality and privacy of employee records and payroll data.
7. ~~Respond to requests and inquiries from District employees.~~ Convey technical concepts to others in challenging exchanges of information with tact, patience and courtesy.
8. ~~Work independently in the absence of supervision.~~ Extract data from databases and import into formats that produce reports to perform a variety of technical payroll accounting duties to ensure District employees are paid in an accurate and timely manner.
9. ~~Understand and follow oral and written instructions.~~ Maintain accurate financial and statistical records; monitor, audit, adjust and reconcile payroll data.
10. ~~Communicate clearly and concisely, both orally and in writing.~~ Identify, investigate and resolve financial errors and discrepancies.
11. ~~Establish and maintain cooperative working relationships with those contacted in the course of work.~~ Operate standard office equipment including a computer and assigned software.
12. Communicate effectively both orally and in writing.
13. Establish and maintain cooperative and effective working relationships with others.
14. Meet schedules and time lines.
15. Perform arithmetic calculations quickly and accurately.
16. Type or input data at an acceptable rate of speed.
17. Maintain regular and consistent attendance.

EXPERIENCE AND EDUCATION:

~~Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:~~

Any combination equivalent to sufficient experience, training and/or education to demonstrate the knowledge and abilities listed above. Typically, gained through graduation from high school or equivalent, supplemented by college level course work in accounting or related field.

Experience:

~~Three years of increasingly responsible experience in financial record keeping.~~

Three years of increasingly responsible experience in payroll, accounting or related field.

Training:

Equivalent to completion of the twelfth grade. ~~supplemented by coursework in bookkeeping, accounting or a related field.~~

Physical Demands and Requirements:

Including, but not limited to, working in a standard office environment, dexterity of hands and fingers to operate a computer keyboard, sight to read a variety of materials, hearing and speaking to exchange information, and sitting for extended periods of time.

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE June 12, 2019 _____ REPORT

TO: Personnel Commission _____ X ACTION

FROM: Mary Theus
Interim Director, Personnel Commission

RE: APPROVAL OF REVISION TO JOB DESCRIPTION - FACILITIES PLANNING TECHNICIAN
CONSIDER SALARY SCHEDULE PLACEMENT FOR APPROVAL

BACKGROUND

A job description for Facilities Planning Technician is in place to assist with a broad range of duties related to facilities planning and construction, and serve as the liaison between District administration and governmental agencies.

STATUS

A revision to the job description has been recommended to change the supervising authority and clearly identify the responsibilities for the position. As per recent requests by the District and dialogue with the Commission, salary schedule placement is proposed at Range 38.

The District is advising the Commission of CSEA's recommendation for salary schedule placement at Range 42. This range is not established and does not appear on the current classified salary schedule.

RECOMMENDATION

It is recommended that the Personnel Commission approve the revisions to the job description for Facilities Planning Technician, and confirm/approve salary schedule placement.

FACILITIES PLANNING TECHNICIAN

Bargaining Unit: Classified

CURRENT SALARY SCHEDULE PLACEMENT

Range 34 (\$4,004.00 - \$4,867.20) Monthly

PROPOSED SALARY SCHEDULE PLACEMENT

Range 38 (\$4,420.00 - \$5,375.07) Monthly

DEFINITION:

Under the direction of the ~~Deputy Superintendent~~, **Chief Business Officer** or designee, assists in performing a wide range of duties related to the planning and construction of new facilities and the improvement of older facilities; serves as a liaison between District administration and governmental agencies regarding facility planning and construction; conduct studies; analyze and prepare written reports.

SUPERVISION RECEIVED AND EXERCISED:

Receives general supervision from the ~~Deputy Superintendent~~, **Chief Business Officer** or designee.

EXAMPLE OF DUTIES:

1. Establish and maintain database for collecting organizing, and analyzing data for housing and population trends, pupil yield factors, enrollment projections, school attendance boundaries, community facility districts, developer fee systems, and responds to inquiries regarding same.
2. ~~Communicates, submits, and monitors information and applications related to the State School Building program; with~~ **Communicate with a wide variety of internal and external personnel (e.g. administrators, state architect, district counsel, assessor's office etc.) for the purpose of coordinating and monitoring activities, resolving conflicts and exchanging information.** ~~facilitate district relationships with Office of Public School Construction (OPSC), State Department of Education, Facility Planning Division, and Division of the State Architect.~~
3. Prepare a variety of financial and District related reports for the county, state and federal governments; prepare federal and state claim form for reimbursement; prepare year end reports.
4. Participate in compiling and analyzing bid packages.
5. Conduct research and analysis; prepare demographic projections and develop short and long range plans for housing of students and District functions.
6. Participate in the development and coordination of the District budgets; **perform** technical accounting **duties** for facilities projects; input, ~~and~~ update and reconcile budget data as required; maintain ongoing budget analysis postings and reports.
7. Maintain various financial or statistical records requiring the use of independent judgment; verify, balance, and adjust a variety of accounts.
8. Organize and maintain departmental records, forms, files and documents necessary for a variety of calculations, transactions, and documentation.
9. Participate in the development and monitoring of the District's Master Plan for school facilities, proposed funding sources for financing, remodeling, and construction.

PROPOSED REVISION

Personnel Commission Regular Meeting 06/12/2019

10. ~~Prepare and present~~ **Assist in the preparation of** various complex reports to **present to** the Board of Trustees and/or the community regarding zoning, development, etc. as it relates to the District.
11. **Perform other related duties as assigned for the purpose of ensuring the efficient and effective functioning of work unit.**

QUALIFICATIONS:

Knowledge of:

1. General terms, principles, and practices used in the planning, design, construction, rehabilitation and remodeling of schools. California school facility functions, including funding alternatives, facility planning strategies, and general knowledge of the construction industry.
2. State school building process, including application materials.
3. Effective public relations techniques.
4. Data processing terminology and application.
5. ~~Word processing and computer spreadsheet software.~~ **Computer software applications (e.g. Microsoft Word, Excel)**
6. Correct English grammar, spelling, punctuation, and vocabulary.
7. Practical operating knowledge of accounting and mathematics.

Ability to:

1. Perform a wide range of professional, administrative, advocacy, and liaison duties involved in facility planning.
2. Use independent achievement in analyzing facility planning functions and procedures.
3. Analyze, interpret, and apply provisions of federal, state, and local regulations and statutes applicable to school facilities planning, construction, and utilization.
4. Coordinate and integrate the efforts and interests of diverse participants in the facility planning process.
5. Prepare written analyses, program funding applications, forms and reports.
6. Communicate effectively, both orally and in writing.
7. Operate a variety of office equipment including a typewriter, computer, and calculating machines.
8. Establish and maintain cooperative working relationships with those contacted in the course of work.

EXPERIENCE AND EDUCATION:

Any combination of training and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Three years increasingly responsible facility planning experience ~~in the maintenance of~~ and financial or statistical data, preferably in the area of facilities planning for a large institution; use of computers, including database, spreadsheet and word processing software (GIS software experience preferred).

Training:

Equivalent to the completion of the twelfth grade supplemented by additional coursework in bookkeeping, accounting, or related field.

LICENSE AND CERTIFICATIONS:

Possession of an appropriate, valid driver's license.

Possession of an appropriate, valid California driver's license prior to the completion of the probationary period.

Ability to be covered under the District property/liability insurance.

EXECUTIVE ASSISTANT - NON CONFIDENTIAL

Bargaining Unit: Classified

CURRENT SALARY SCHEDULE PLACEMENT

Range 35 (\$4,104.53 - \$4,988.53) Monthly

PROPOSED SALARY SCHEDULE PLACEMENT

Range 38 (\$4,420.00 - \$5,375.07) Monthly

DEFINITION:

To perform highly responsible secretarial duties and responsibilities in support of a cabinet level District administrator; to relieve the administrator of a wide variety of office and routine administrative duties; and to coordinate activities with other District staff.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from a cabinet-level District administrator.

EXAMPLE OF DUTIES:

Duties may include, but are not limited to, the following:

1. Serve as personal and confidential secretary to a cabinet-level District administrator; take and transcribe dictation; type letters, memoranda and reports; compose correspondence and memorandums.
2. Maintain **appointment calendars** for cabinet-level **and** District administrator's **appointment calendar**; set up meetings and conferences between a cabinet-level District administrator and District personnel, outside agencies and general public.
3. Prepare report drafts **and surveys**; compile, assemble and summarize information, and data.
4. Review and update administrative details not requiring the immediate attention of the cabinet-level District administrator.
5. Arrange committee and other meetings and send out notices; may attend meetings to take minutes; prepare summaries; distribute to appropriate staff.
6. Participate in coordinating and administering division budgets; monitor and control expenditures.
7. Respond to and resolve inquiries and complaints; exercise judgment in policy explanations; when necessary, refer inquiries and complaints to appropriate staff.
8. Draft and prepare agenda items for Board meetings; review and prepare items submitted by others; coordinate agenda items with the Superintendent's office; **update Board Policy as changes are recommended.**
9. Make necessary arrangements for **District** staff attendance at conferences, **professional development activities**, workshops and meetings; secure airline transportation, hotel accommodations and other necessary items.

10. Maintain and update important records and forms.
11. **Prepare contracts, Memorandum of Understandings (MOUs), and personnel requisitions for department.**
12. **Coordinate special programs in support of department activities, and student leadership programs;** distribute materials to District staff, school site personnel and the general public.
13. Open, read and distribute mail; review incoming mail to the cabinet-level District administrator; determine priority and/or action to be taken by the cabinet-level District administrator.
14. Order and maintain office supplies and materials
15. Answer, screen and direct telephone calls to appropriate staff.
16. **Create and distribute district-wide information (e.g. student calendar, bell schedule, Student Handbook and Annual Notification).**
17. **Assist with logistical and administrative support for District programs and events.**
18. **Fulfill district record requests (e.g. subpoenas, student information); collect data for completion of federal reports.**
19. **Serve as the dispatcher or backup for the District Emergency Line and Radio System.**
20. **Oversee and maintain enrollment-related programs such as the District Lottery and the Intra-District Transfer process.**
21. **Perform other related duties as assigned for the purpose of ensuring the efficient and effective functioning of work unit.**

QUALIFICATIONS:

MINIMUM QUALIFICATIONS:

Knowledge of:

1. Basic functions and clerical operations of school district;
2. Pertinent federal, state, and local laws, codes and regulations;
3. District policies and procedures;
4. Principles and procedures of record keeping;
5. Modern office procedures, methods and computer equipment;
6. Business letter writing and basic report preparation.
7. Basic budgeting principles and practices;
8. Principles and procedures of data collection and report writing;
9. English usage, spelling, grammar and punctuation.

Ability to:

1. Interpret and apply federal, state, local and district policies, procedures, laws and regulations
2. Perform difficult and responsible clerical and secretarial work with speed and accuracy.
3. Summarize clearly, concisely and accurately minutes of meetings and proceedings;
4. Maintain confidentiality of work;
5. Maintain complete records and compile accurate reports;
6. Compose correspondence independently;

7. Type at a speed necessary for successful job performance.
8. Take and transcribe dictation at a speed necessary for successful job performance.
9. Operate a variety of office equipment;
10. Communicate clearly and concisely, both orally and in writing.
11. Establish and maintain cooperative working relationships with those contacted in the course of work.

EXPERIENCE AND EDUCATION:

EXPERIENCE AND TRAINING GUIDELINES:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

EXPERIENCE:

Four years of increasingly responsible secretarial and clerical experience. Experience in a public school district is desirable.

TRAINING:

Equivalent to the completion of the twelfth grade supplemented by secretarial training

PALMDALE SCHOOL DISTRICT

PERSONNEL COMMISSION

AGENDA ITEM

DATE: June 12, 2019 X REPORT
TO: Personnel Commission ACTION
FROM: Mary Theus
Interim Director, Personnel Commission
RE: MONTHLY EXPENSES REVIEW

BACKGROUND

Attached are the expenses as captured by Infinite Visions for the dates listed at the top of the report. Expenses are categorized by Object code.

STATUS

This action supports student achievement by procuring supplies, materials, equipment and services while ensuring that district funds are being managed in accordance with all applicable state and federal laws and Board policy.

The Commissioners will review transactions entered into by the Personnel Commission Director or employees delegated with the authority to procure supplies, materials, apparatus, equipment, and services.

RECOMMENDATION

It is recommended that the Personnel Commission review the monthly expenses as presented by the attached report from Infinite Visions.

Palmdale School District

Personnel Commission 230

From Date: 5/1/2019

To Date: 5/31/2019

Fiscal Year: 2018-2019

| Account Number | Description | Budget | Adjustments | GL Budget | Range To Date | YTD | Balance | Encumbrance | Budget Bal | %Bud |
|--|-------------|------------|-------------|------------|---------------|------------|------------|-------------|------------|--------|
| 01.0.00000.0.00000.74400.4320. 23000000 | Supplies | \$8,800.00 | \$0.00 | \$8,800.00 | \$195.47 | \$3,795.40 | \$5,004.60 | \$748.41 | \$4,256.19 | 48.37% |

Transaction Detail (Standard)

| Reference Number | Requisition Number | PO/Ship Number | Description | Name | Journal | Amount |
|------------------|--------------------|----------------|-------------|---------------------------|------------------|----------|
| PINV0566806 | 96515 | 196197 | AP POSTING | SOUTHWEST SCHOOL & OFFICE | Accounts Payable | \$195.47 |
| | | | | | Detail Total: | \$195.47 |

| | | | | | | | | | | |
|--|--------------------------|-------------|--------|-------------|---------|-------------|------------|--------|------------|---------|
| 01.0.00000.0.00000.74400.4380. 23000000 | Supplies-Technology | \$1,950.00 | \$0.00 | \$1,950.00 | \$0.00 | \$555.72 | \$1,394.28 | \$0.00 | \$1,394.28 | 71.50% |
| 01.0.00000.0.00000.74400.4420. 23000000 | Non Cap Asset | \$1,000.00 | \$0.00 | \$1,000.00 | \$0.00 | \$0.00 | \$1,000.00 | \$0.00 | \$1,000.00 | 100.00% |
| 01.0.00000.0.00000.74400.4480. 23000000 | Non Cap Asset Technology | \$17,671.00 | \$0.00 | \$17,671.00 | \$0.00 | \$15,182.97 | \$2,488.03 | \$0.00 | \$2,488.03 | 14.08% |
| 01.0.00000.0.00000.74400.5210. 23000000 | Mileage | \$2,000.00 | \$0.00 | \$2,000.00 | \$76.21 | \$390.15 | \$1,609.85 | \$0.00 | \$1,609.85 | 80.49% |

Transaction Detail (Standard)

| Reference Number | Requisition Number | PO/Ship Number | Description | Name | Journal | Amount |
|------------------|--------------------|----------------|-------------|-------------|------------------|---------|
| APR19MILG | 0 | 0 | AP POSTING | THEUS, MARY | Accounts Payable | \$76.21 |
| | | | | | Detail Total: | \$76.21 |

Palmdale School District

Personnel Commission 230

From Date: 5/1/2019

To Date: 5/31/2019

Fiscal Year: 2018-2019

| Account Number | Description | Budget | Adjustments | GL Budget | Range To Date | YTD | Balance | Encumbrance | Budget Bal | %Bud |
|--|-------------------------------|-----------------------|--|----------------------------|------------------|---------------|--------------|-------------|-------------|---------|
| 01.0.00000.0.00000.74400.5220. 23000000 | Conferences/Mileage | \$13,451.00 | \$0.00 | \$13,451.00 | \$176.32 | \$9,846.33 | \$3,604.67 | \$1,806.18 | \$1,798.49 | 13.37% |
| Transaction Detail (Standard) | | | | | | | | | | |
| <u>Reference Number</u> | <u>Requisition Number</u> | <u>PO/Ship Number</u> | <u>Description</u> | <u>Name</u> | <u>Journal</u> | <u>Amount</u> | | | | |
| CF19142MI3 | 19161 | 19163 | AP POSTING | CONFERENCES | Accounts Payable | \$176.32 | | | | |
| | | | | | | Detail Total: | \$176.32 | | | |
| 01.0.00000.0.00000.74400.5310. 23000000 | District Membership | \$3,350.00 | \$0.00 | \$3,350.00 | \$0.00 | \$3,350.00 | \$0.00 | \$0.00 | \$0.00 | 0.00% |
| 01.0.00000.0.00000.74400.5712. 23000000 | Direct Costs-Printing | \$2,000.00 | \$0.00 | \$2,000.00 | \$30.00 | \$446.00 | \$1,554.00 | \$0.00 | \$1,554.00 | 77.70% |
| Transaction Detail (Standard) | | | | | | | | | | |
| <u>Reference Number</u> | <u>Requisition Number</u> | <u>PO/Ship Number</u> | <u>Description</u> | <u>Name</u> | <u>Journal</u> | <u>Amount</u> | | | | |
| 5254 | 0 | 0 | JE190530 REPROGRAPHICS CHARGEBACKS MARCH 2019 | amodlin | Adjusting | \$30.00 | | | | |
| | | | | | | Detail Total: | \$30.00 | | | |
| 01.0.00000.0.00000.74400.5719. 23000000 | Direct Costs-Mailing Services | \$1,500.00 | \$0.00 | \$1,500.00 | \$18.15 | \$356.17 | \$1,143.83 | \$0.00 | \$1,143.83 | 76.26% |
| Transaction Detail (Standard) | | | | | | | | | | |
| <u>Reference Number</u> | <u>Requisition Number</u> | <u>PO/Ship Number</u> | <u>Description</u> | <u>Name</u> | <u>Journal</u> | <u>Amount</u> | | | | |
| 5176 | 0 | 0 | JE190513 POSTAGE CHARGEBACKS APRIL 2019 | amodlin | Adjusting | \$18.15 | | | | |
| | | | | | | Detail Total: | \$18.15 | | | |
| 01.0.00000.0.00000.74400.5810. 23000000 | Advertising - Legal | \$9,940.00 | \$0.00 | \$9,940.00 | \$552.32 | \$3,969.85 | \$5,970.15 | \$0.00 | \$5,970.15 | 60.06% |
| Transaction Detail (Standard) | | | | | | | | | | |
| <u>Reference Number</u> | <u>Requisition Number</u> | <u>PO/Ship Number</u> | <u>Description</u> | <u>Name</u> | <u>Journal</u> | <u>Amount</u> | | | | |
| 19133PD | 96727 | 196421 | AP POSTING | SCHOOL NEWS ROLL CALL, LLC | Accounts Payable | \$263.00 | | | | |
| 300084979 | 96684 | 196335 | AP POSTING | A V PRESS | Accounts Payable | \$139.32 | | | | |
| 3385669 | 96722 | 196420 | AP POSTING | BOXWOOD TECHNOLOGY INC | Accounts Payable | \$150.00 | | | | |
| | | | | | | Detail Total: | \$552.32 | | | |
| 01.0.00000.0.00000.74400.5822. 23000000 | Legal Expenses | \$152,559.00 | \$0.00 | \$152,559.00 | \$62.00 | \$47,589.40 | \$104,969.60 | \$17,410.60 | \$87,559.00 | 57.39% |
| Transaction Detail (Standard) | | | | | | | | | | |
| <u>Reference Number</u> | <u>Requisition Number</u> | <u>PO/Ship Number</u> | <u>Description</u> | <u>Name</u> | <u>Journal</u> | <u>Amount</u> | | | | |
| 607581 | 91247 | 191250 | AP POSTING | FAGEN FRIEDMAN & FULFROST | Accounts Payable | \$62.00 | | | | |
| | | | | | | Detail Total: | \$62.00 | | | |
| 01.0.00000.0.00000.74400.5828. 23000000 | Software Support | \$24,530.00 | \$0.00 | \$24,530.00 | \$0.00 | \$24,295.20 | \$234.80 | \$0.00 | \$234.80 | 0.96% |
| 01.0.00000.0.00000.74400.5830. 23000000 | Consultants | \$6,000.00 | \$0.00 | \$6,000.00 | \$0.00 | \$0.00 | \$6,000.00 | \$0.00 | \$6,000.00 | 100.00% |
| 01.0.00000.0.00000.74400.5890. 23000000 | Other Operation Services | \$800.00 | \$0.00 | \$800.00 | \$0.00 | \$0.00 | \$800.00 | \$600.00 | \$200.00 | 25.00% |

Palmdale School District

Personnel Commission 230

From Date: 5/1/2019

To Date: 5/31/2019

Fiscal Year: 2018-2019

| Account Number | Description | Budget | Adjustments | GL Budget | Range To Date | YTD | Balance | Encumbrance | Budget Bal | %Bud |
|---|-------------|---------------------|---------------|---------------------|-------------------|---------------------|---------------------|--------------------|---------------------|----------------|
| 01.0.00000.0.00000.74400.5899. 2300000 | Suspense | \$11,445.00 | \$0.00 | \$11,445.00 | \$0.00 | \$0.00 | \$11,445.00 | \$0.00 | \$11,445.00 | 100.00% |
| Function: Personnel Commission - 74400 | | | | | | | | | | |
| | | \$753,401.00 | \$0.00 | \$753,401.00 | \$5,255.90 | \$478,722.95 | \$274,678.05 | \$20,565.19 | \$254,112.86 | 33.73 % |
| 01.0.00000.0.00000.82000.2230. 2300000 | Custodian | \$11,658.00 | \$0.00 | \$11,658.00 | \$119.91 | \$8,818.22 | \$2,839.78 | \$0.00 | \$2,839.78 | 24.36% |

Transaction Detail (Standard)

| Reference Number | Requisition Number | PO/Ship Number | Description | Name | Journal | Amount |
|------------------|--------------------|----------------|-------------|--------|---------------|----------|
| 5539 | 0 | 0 | ZHRS140001 | wscott | Adjusting | \$119.91 |
| | | | | | Detail Total: | \$119.91 |

| | | | | | | | | | | |
|---|----------------------|------------|--------|------------|--------|------------|----------|--------|----------|---------|
| 01.0.00000.0.00000.82000.2231. 2300000 | Custodian-extra duty | \$373.00 | \$0.00 | \$373.00 | \$0.00 | \$0.00 | \$373.00 | \$0.00 | \$373.00 | 100.00% |
| 01.0.00000.0.00000.82000.4320. 2300000 | Supplies | \$1,930.00 | \$0.00 | \$1,930.00 | \$0.00 | \$1,394.29 | \$535.71 | \$0.00 | \$535.71 | 27.76% |

Transaction Detail (Standard)

| Reference Number | Requisition Number | PO/Ship Number | Description | Name | Journal | Amount |
|------------------|--------------------|----------------|-------------|-------------|------------------|-----------|
| 485214258 | 96147 | 195810 | AP POSTING | SUPPLYWORKS | Accounts Payable | \$21.92 |
| 488856816 | 96147 | 195810 | AP POSTING | SUPPLYWORKS | Accounts Payable | (\$21.92) |
| | | | | | Detail Total: | \$0.00 |

| | | | | | | | | | | |
|---|----------------|----------|--------|----------|---------|----------|---------|---------|--------|-------|
| 01.0.00000.0.00000.82000.4393. 2300000 | Water, Bottled | \$200.00 | \$0.00 | \$200.00 | \$31.36 | \$145.04 | \$54.96 | \$54.96 | \$0.00 | 0.00% |
|---|----------------|----------|--------|----------|---------|----------|---------|---------|--------|-------|

Transaction Detail (Standard)

| Reference Number | Requisition Number | PO/Ship Number | Description | Name | Journal | Amount |
|-------------------------|--------------------|----------------|-------------|------------|------------------|---------|
| 4449953050119MA RAPR | 91183 | 191773 | AP POSTING | SPARKLETTS | Accounts Payable | \$31.36 |
| | | | | | Detail Total: | \$31.36 |

Function: Operations - 82000

| | | | | | | | | | | |
|---------------------|--|---------------------|---------------|---------------------|-------------------|---------------------|---------------------|--------------------|---------------------|----------------|
| | | \$22,599.00 | \$0.00 | \$22,599.00 | \$200.14 | \$16,862.36 | \$5,736.64 | \$54.96 | \$5,681.68 | 25.14 % |
| Grand Total: | | \$776,000.00 | \$0.00 | \$776,000.00 | \$5,456.04 | \$495,585.31 | \$280,414.69 | \$20,620.15 | \$259,794.54 | 33.48% |

End of Report