

**FOUNTAIN VALLEY SCHOOL DISTRICT
PERSONNEL COMMISSION**

Regular Meeting

AGENDA

Fountain Valley School District
10055 Slater Avenue
Fountain Valley, CA 92708

January 18, 2017
1:15 p.m.

Mrs. Carol Davis, Chairperson
Mr. William Mullin, Vice Chairperson
Rabbi Stephen Einstein, Member
Mr. Ross Hessler, Director, Human Resources

- **CALL TO ORDER**
- **PLEDGE OF ALLEGIANCE**
- **ROLL CALL**
- **APPROVAL OF AGENDA**

GENERAL FUNCTIONS

1. **Introduction of Guests**
2. **Introduction of Staff**
3. **Reading and Approval of Minutes - Regular Meeting of the Personnel Commission, December 15, 2016** *Action*
(Attachment #1)
4. **Agenda, Special Meeting of the Board of Trustees, January 5, 2017** *Information*
(Attachment #2)
5. **Agenda, Regular Meeting of the Board of Trustees, January 12, 2017** *Information*
(Attachment #3)
6. **Director's Report** *Information*
7. **Commissioners' Comments** *Information*
8. **Public Comments**

Members of the community and staff are welcome to address the Personnel Commission on any item listed on the Agenda or Business or any other item or specific concern within the jurisdiction of the Personnel Commission. Speakers are requested to limit their presentation to four minutes.

ADMINISTRATION

- 9. Classification Study Proposals**
(Attachments #4 - #7)

Action

- 10. Eligibility Lists**

*Office Assistant, Custodian, Head Custodian, and
Senior Payroll Technician*
(Attachment #8)

Action

PERSONNEL

- 11. Job Announcements**
(Attachment #9)

Information

FINANCIAL

- 12. Nothing to Report**

CLOSED SESSION

- 13. Closed Session**

The Commission may discuss one or more of the following topics in Closed Session:

1. Personnel
2. Legal Advice

NEXT MEETING

- 14. The next meeting of the Personnel Commission will be:**

**February 9, 2017
4:30 p.m.
Board Room**

ADJOURNMENT

- 15. Adjournment**

FOUNTAIN VALLEY SCHOOL DISTRICT

PERSONNEL DIVISION

MEMORANDUM

TO: Personnel Commission

FROM: Ross M. Hessler, Director, Human Resources

SUBJECT: **MINUTES, PERSONNEL COMMISSION-REGULAR
MEETING OF DECEMBER 15, 2016**

DATE: January 18, 2017

Attached for your approval are the minutes of the Personnel Commission regular meeting of December 15, 2016.

RECOMMENDATION

The Personnel Commission approve the minutes of December 15, 2016 Personnel Commission regular meeting.

Attachment #1

**FOUNTAIN VALLEY SCHOOL DISTRICT
PERSONNEL COMMISSION**

REGULAR MEETING

MINUTES

December 15, 2016

4:30 p.m.

Rabbi Einstein called the Regular Meeting of the Personnel Commission to order at 4:35 p.m. in the Board Room, 10055 Slater Avenue, Fountain Valley, California. Ms. Cathie Abdel led the Pledge of Allegiance.

Present for the entire meeting:

Rabbi Stephen Einstein, Chairperson
Mrs. Carol Davis, Vice Chairperson
Mr. William Mullin, Member
Mr. Ross Hessler, Director, Human Resources

GENERAL FUNCTIONS

Approval of Agenda

Mr. Mullin moved to approve the agenda of the November 17, 2016 meeting. Mrs. Davis seconded the motion. Motion carried.

Introduction of Guests

Mrs. Cathie Abdel, Ms. Suzie Davis, Ms. Cheryl Hall, Ms. Kitty Kaufman and Ms. Sandy O'Toole

Introduction of Staff

Ms. Donna Johnson

Minutes, Regular Meeting of the Personnel Commission, November 17, 2016

Mrs. Davis moved to approve the minutes of the November 17, 2016 meeting. Mr. Mullin was absent for that meeting so the automatic second will be used. Motion carried.

Minutes, Regular Meeting of the Board of Trustees, November 17, 2016

Presented as an information item only.

Minutes, Special Meeting of the Board of Trustees, November 22, 2016

Presented as an information item only.

Agenda, Regular Meeting of the Board of Trustees, November 17, 2016

Presented as an information item only.

Agenda, Regular Meeting of the Board of Trustees, November 22, 2016

Presented as an information item only.

Agenda, Regular Meeting of the Board of Trustees, December 8, 2016

Presented as an information item only.

Director's Report

Mr. Hessler welcomed Ms. Donna Johnson as the newly hired Classified Personnel Technician. He reported the transition is busy but going smoothly with Mr. Hessler and Ms. O'Cain helping out. The test for the Sr. Payroll Technician is next Monday. Mr. Hessler noted the school calendar is out on the District website for next school

year. He followed up on Mrs. Davis' question from the November 17th Board meeting. The question regarded the not to exceed contract for up to \$16,000 for bus services to Ocean View School District. This is a routine contract for Fountain Valley School District to provide bus drivers and school buses.

Commissioners' Comments

Mrs. Davis, Rabbi Einstein and Mr. Mullin wished everyone Happy Holidays. Mr. Mullin questioned if there had been any interest in changing the school calendar to start earlier in the summer. Mrs. Abdel stated the school calendars for 2017-2018 and 2018-2019 had already been established following the traditional pattern. Rabbi Einstein and Mrs. Davis mentioned they are a negotiated item.

Public Comments

Ms. Suzie Davis spoke on behalf of the School Office Managers. She thanked the Personnel Commission for their openness, warmth, and support for their reclassification request. They are interested in making sure if the classification study should not go forward that the Commission would look at the School Office Manager classification individually.

ADMINISTRATION

Election of Personnel Commission Officers

Mr. Mullin moved to nominate Mrs. Davis for Chairperson for 2017. Mrs. Davis seconded. Motion carried. Mrs. Davis moved to nominate Mr. Mullin for Vice Chairperson for 2017. Mr. Mullin seconded. Motion carried.

Personnel Commission Dates set for 2017

Three dates were adjusted and the calendar set for 2017.

Request for Classification Study- School Office Manager

Rabbi Einstein mentioned this item had been tabled last month due to Mr. Mullin not being in attendance. Rabbi Einstein noted the reclassification study is moving forward in January at the next meeting. Mr. Mullin stated that was the commission's mandate and all positions should be looked at periodically. Rabbi Einstein mentioned three companies are giving presentations in January and all three companies are ready to start once the selection process is complete. Mrs. Davis mentioned this classification will be included in the study.

Classification Plan Amendment-Movement of Confidential Position of Sr. Payroll Technician to Classified Salary Schedule

Mr. Hessler stated this position does not have the required degree of involvement in developing management positions to truly qualify for a confidential position. Also, this classification is not confidential at other districts and this position and possibly others were slated to be looked at as any vacancies arose. Mr. Hessler stated the position fits in the accounting family at range 66. He stated that most of our applicants come from an accounting background. The Payroll Clerk position is already in this family. Mr. Mullin moved to approve the placement of the non-confidential classification of Sr. Payroll Technician in the accounting family. This position will be on the classified salary schedule at range 66. Mrs. Davis seconded. Motion carried.

Classification Plan Amendment-Creation of New Classification of Special Education Bus Aide

Mr. Hessler stated this position is currently being handled by the bus drivers or other higher level employees. Mrs. Davis stated that if this position becomes more involved medically that the commission take a second look at the position. Mr. Mullin moved to create the Special Education Bus Aide position on the classified salary schedule at range 21, in the Transportation job family. Mrs. Davis seconded. Motion carried.

Eligibility Lists

None Presented

PERSONNEL

Job Announcements

Job postings were reviewed for Open and Promotional – Senior Payroll Technician, Instructional Assistant-Special Education, Extended School Program Aide, and Behavior Intervention Assistant.

FINANCIAL

Nothing to report

CLOSED SESSION

No closed session.

NEXT MEETING

The next meeting of the Personnel Commission will be:

Regular Meeting:

January 18, 2017

1:15 p.m.

Board Room

ADJOURNMENT

The December 15, 2016 regular meeting of the Personnel Commission was adjourned at 5:15 p.m.

Rabbi Stephen Einstein, Chairperson

Mrs. Carol Davis, Vice Chairperson

FOUNTAIN VALLEY SCHOOL DISTRICT

PERSONNEL DIVISION

MEMORANDUM

TO: Personnel Commission

FROM: Ross M. Hessler, Director, Human Resources

SUBJECT: **AGENDA, OF THE BOARD OF TRUSTEES SPECIAL
MEETING OF JANUARY 5, 2017**

DATE: January 18, 2017

Attached for your information is the agenda of the Board of Trustees special meeting of January 5, 2017.



Fountain Valley School District

BOARD OF TRUSTEES
SPECIAL MEETING

AGENDA

Board Room
10055 Slater Avenue
Fountain Valley, CA

January 5, 2017

- CALL TO ORDER: 5:30PM
- ROLL CALL
- APPROVAL OF AGENDA

M _____
 2nd _____
 V _____

- PLEDGE OF ALLEGIANCE

BOARD WORKSHOP

1. FACILITIES WORKSHOP

District Counsel Martin Hom of Atkinson, Andelson, Loya, Ruud and Romo, will lead the Board of Trustees through a discussion of construction delivery options in the Fountain Valley School District following the passing of Measure O.

- PUBLIC COMMENTS

Speakers may address the Board of Trustees on Closed Session Items. Please comply with procedures listed on the goldenrod form "For Persons Wishing to Address the Board of Trustees" and give the form to the Executive Assistant.

- CLOSED SESSION

The Board of Trustees will retire into Closed Session to address the following:

- Personnel Matters: *Government Code 54957 and 54957.1*
Appointment/Assignment/Promotion of employees; employee discipline/dismissal/release; evaluation of employee performance; complaints/charges against an employee; other personnel matters.
- Pupil Personnel: *Education Code 35146*
- Negotiations: *Government Code 54957.6*

Our mission is to promote a foundation for academic excellence, mastery of basic skills, responsible citizenship, and a desire by students to achieve their highest potential through a partnership with home and community.

Update and review of negotiations with the FVEA and CSEA Bargaining Units with the Board's designated representative, Cathie Abdel.

SUPERINTENDENT'S COMMENTS/NEW ITEMS OF BUSINESS

The Board President will receive any announcements concerning new items of business from board members or the superintendent.

- CLOSED SESSION
- APPROVAL TO ADJOURN

The next regular meeting of the Fountain Valley School District Board of Trustees is on Thursday, January 12, 2017 at 7:00pm.

A copy of the Board Meeting agenda is posted on the District's web site (www.fvdsd.us). Materials related to this agenda submitted to the Board of Trustees less than 72 hours prior to the meeting are available for public inspection by contacting the Superintendent's Office at 10055 Slater Avenue, Fountain Valley, CA 92708 or call 714.843.3255 during normal business hours.

Reasonable Accommodation for any Individual with a Disability: Any individual with a disability who requires reasonable accommodation to participate in a board meeting may request assistance by contacting the Superintendent's office: 10055 Slater Avenue, Fountain Valley, CA 92708 or call (714) 843-3255 or FAX (714) 841-0356.

FOUNTAIN VALLEY SCHOOL DISTRICT

PERSONNEL DIVISION

MEMORANDUM

TO: Personnel Commission

FROM: Ross M. Hessler, Director, Human Resources

SUBJECT: **AGENDA, OF THE BOARD OF TRUSTEES REGULAR
MEETING OF JANUARY 12, 2017**

DATE: January 18, 2017

Attached for your information is the agenda of the Board of Trustees regular meeting of January 12, 2017.



Fountain Valley School District

BOARD OF TRUSTEES
REGULAR MEETING

A G E N D A

Board Room
10055 Slater Avenue
Fountain Valley, CA

January 12, 2017

- CALL TO ORDER: 5:30PM
- ROLL CALL
- APPROVAL OF AGENDA

M ___
 2nd ___
 V ___

BOARD WORKSHOP

1. BOOKSTUDY: *THE ADVANTAGE*

Superintendent, Mark Johnson, Ed.D., will lead the Board of Trustees through an eighth session focused on a study of *The Advantage* by Patrick Lencioni.

2. FACILITIES DISCUSSION

The Board of Trustees will have an opportunity to ask questions of senior staff regarding delivery options following the workshop that took place at the Special Board meeting on January 5, 2017.

- PUBLIC COMMENTS

Speakers may address the Board of Trustees on Closed Session Items. Please comply with procedures listed on the goldenrod form "For Persons Wishing to Address the Board of Trustees" and give the form to the Executive Assistant.

- CLOSED SESSION

The Board of Trustees will retire into Closed Session to address the following:

- Personnel Matters: *Government Code 54957 and 54957.1*
 Appointment/Assignment/Promotion of employees; employee discipline/dismissal/release; evaluation of employee performance; complaints/charges against an employee; other personnel matters.

Our mission is to promote a foundation for academic excellence, mastery of basic skills, responsible citizenship, and a desire by students to achieve their highest potential through a partnership with home and community.

- Pupil Personnel: *Education Code 35146*
- Negotiations: *Government Code 54957.6*
Update and review of negotiations with the FVEA and CSEA Bargaining Units with the Board's designated representative, Cathie Abdel.
- OPEN SESSION: 7:00PM
- PLEDGE OF ALLEGIANCE will be led by Pack 455.

SPECIAL PRESENTATIONS

3. RECOGNITION OF STUDENTS FROM COURREGES SCHOOL

It is an interest of the Board of Trustees to recognize students who display high achievement, improvement or extraordinary effort. The Board will recognize seven outstanding students from Courreges School.

4. RECOGNITION OF PARENT VOLUNTEERS FROM COURREGES SCHOOL

It is an interest of the Board of Trustees to recognize outstanding parent volunteers who give generously of their time and talents to our schools. From Courreges School, the Board shall recognize and thank Petra Erlandson and Brittany Bradshaw.

- RECESS

PUBLIC HEARING

5. TENTATIVE AGREEMENT BETWEEN FOUNTAIN VALLEY SCHOOL DISTRICT AND FOUNTAIN VALLEY EDUCATION ASSOCIATION FOR 2016-17 YEAR

The Board of Trustees will conduct a public hearing for the purpose of receiving public comment on the proposed tentative agreement for the 2016-17 school year between FVSD and FVEA. Public input is welcome.

BOARD REPORTS AND COMMUNICATIONS

Board Members will make the following reports and communicate information to fellow Board Members and staff.

PUBLIC COMMENTS

Members of the community and staff are welcome to address the Board of Trustees on any item listed on the Agenda of Business or any other item of specific concern. Speakers are requested to limit their presentation to four minutes unless the time is waived by a

majority of the Board Members present. If a member of the audience requests a response to their comments, the Board of Trustees may ask the Superintendent/Staff to respond to them personally or in writing after the meeting, or direct that additional information be provided to the Board on a future agenda.

*** BOARD MEMBERS WHO WISH TO DISCUSS WITH STAFF ANY ITEMS LISTED UNDER LEGISLATIVE SESSION SHOULD INFORM THE BOARD PRESIDENT AT THIS TIME.

LEGISLATIVE SESSION

- 6. **PUBLIC DISCLOSURE OF COLLECTIVE BARGAINING AGREEMENT BETWEEN FOUNTAIN VALLEY SCHOOL DISTRICT AND FOUNTAIN VALLEY EDUCATION ASSOCIATION FOR 2016-17 SCHOOL YEAR** M ___
2nd ___
V ___

Attached is the Public Disclosure of Collective Bargaining Agreement between the Fountain Valley School District and the Fountain Valley Education Association for the 2016-17 year.

Superintendent's Recommendation: It is recommended that Board of Trustees approves the Public Disclosure of Collective Bargaining Agreement for the agreement between Fountain Valley School District and the Fountain Valley Education Association for the 2016-17 school year.

- 7. **AGREEMENT BETWEEN FOUNTAIN VALLEY EDUCATION ASSOCIATION AND FOUNTAIN VALLEY SCHOOL DISTRICT FOR THE 2016-17 SCHOOL YEAR** M ___
2nd ___
V ___

Superintendent's Recommendation: It is recommended that the Board of Trustees ratifies this agreement between the FVSD and FVEA dated November 30, 2016.

- 8. **RESOLUTION 2017-12: CERTIFICATION OF ALL PROCEEDINGS IN THE NOVEMBER 8, 2016 GENERAL OBLIGATION BOND ELECTION** M ___
2nd ___
V ___

Superintendent's Recommendation: It is recommended that the Board of Trustees adopts Resolution 2017-12 certifying all proceedings in the November 8, 2016 General Obligation Bond election.

- 9. **RESOLUTION 2017-13 TO ESTABLISH A SPECIAL RESERVE FOR CAPITAL OUTLAY PROJECTS SUB-FUND 40-41** M ___
2nd ___
V ___

Superintendent's Recommendation: It is recommended that the Board of Trustees adopts Resolution 2017-13 to establish a Special Reserve for Capital Outlay Projects Sub-Fund 40-41.

10. CONSENT CALENDAR/ROUTINE ITEMS OF BUSINESS

M _____
2nd _____
V _____

All items listed under the Consent Calendar and Routine Items of Business are considered by the Board of Trustees to be routine and will be enacted by the Board in one action. There will be no discussion of these items prior to the time the Board votes on the motion unless members of the Board, staff, or public request specific items to be discussed and/or removed from the Consent Calendar.

Superintendent's Recommendation: The Board of Trustees approves all items listed under the Consent Calendar and Routine Items of Business in one action.

Routine Items of Business

- 10-A.** Board Meeting Minutes from December 8 Annual Organizational Meeting
- 10-B.** Board Meeting Minutes from January 5 Special Meeting
- 10-C.** Personnel Items (Employment Functions, Workshops/Conferences, and Consultants)
- 10-D.** Donations
- 10-E.** Warrants
- 10-F.** Purchase Order Listing
- 10-G.** Budget Adjustments

Consent Items

10-H. FOUNTAIN VALLEY SCHOOL DISTRICT POLICY MANUAL (SECOND READING AND ADOPTION)

Superintendent's Recommendation: It is recommended that the Board of Trustees approves the Fountain Valley School District Policy Manual for second reading and adoption with changes as indicated by the Board. It is noted that this manual will replace the existing Policy Manual for the Fountain Valley School District.

10-I. WILLIAMS QUARTERLY REPORT FOR SECOND QUARTER 2016-17

Superintendent's Comments: It is recommended that the Board of Trustees receives and approves the Williams Quarterly Report for the second quarter of the 2016-17 year and approve its submittal to the Orange County Department of Education.

10-J. AGREEMENT FOR PARTICIPATION IN THE TWILIGHT EDUCATION PROJECT

Superintendent's Comments: It is recommended that the Board of Trustees approves the agreement for District participation in the Twilight Education Project.

10-K. ROYER STUDIO ANIMATION PROGRAMS

Superintendent's Comments: It is recommended that the Board of Trustees approves

the contract with Royer Studios Animation Programs for December 12, 2016 through March 24, 2017 for Fulton Middle School, Talbert Middle School and Masuda Middle School.

10-L. RATIFICATION OF THE SCOPE OF WORK WITH GOVERNMENT FINANCIAL STRATEGIES, INC. FOR FINANCIAL PLANNING AND ADVISORY WORK ASSOCIATED WITH MEASURE O

Superintendent's Comments: It is recommended that the Board of Trustees ratifies the scope of work with Government Financial Strategies, Inc. for financial planning and advisory work associated with Measure O.

SUPERINTENDENT'S COMMENTS/NEW ITEMS OF BUSINESS

The Board President will receive any announcements concerning new items of business from board members or the superintendent.

- CLOSED SESSION
- APPROVAL TO ADJOURN

The next regular meeting of the Fountain Valley School District Board of Trustees is on Thursday, February 16, 2017 at 7:00pm.

A copy of the Board Meeting agenda is posted on the District's web site (www.fvsd.us). Materials related to this agenda submitted to the Board of Trustees less than 72 hours prior to the meeting are available for public inspection by contacting the Superintendent's Office at 10055 Slater Avenue, Fountain Valley, CA 92708 or call 714.843.3255 during normal business hours.

Board meeting proceedings are tape recorded.

Reasonable Accommodation for any Individual with a Disability: Any individual with a disability who requires reasonable accommodation to participate in a board meeting may request assistance by contacting the Superintendent's office: 10055 Slater Avenue, Fountain Valley, CA 92708 or call (714) 843-3255 or FAX (714) 841-0356.



Fountain Valley School District

10055 Slater Avenue, Fountain Valley, CA 92708 (714) 843-3228 www.fvsd.us

MEMORANDUM

TO: Personnel Commission

FROM: Ross Hessler, Director – Human Resources

SUBJECT: CLASSIFICATION STUDY – CONSULTANT PROPOSALS

DATE: January 10, 2017

There are three consulting firms to be considered to conduct a classification study for FVSD. The study will be district-wide, including our CSEA represented employees, confidential employees, and managers. Each firm responded to our Request for Proposals (attached) and submitted a bid for consideration in November, 2015. The bids are also attached for review.

The schedule for presentations is as follows:

1:30 pm – Reward Strategy Group (RSG)
2:30 pm – Ewing Consulting
3:30 pm – Educational Management Solutions (EMS)

Each consultant is expected to make a PowerPoint presentation and answer questions as needed.

Recommendation

It is recommended that the Personnel Commission make a selection from the consultant group listed following the presentations and discussion.



FOUNTAIN VALLEY SCHOOL DISTRICT

10055 Slater Avenue • Fountain Valley, CA 92708 • (714) 843-3200 • www.fvds.us

REQUEST FOR PROPOSALS Personnel Commission

Classification Study and Compensation Survey

The Fountain Valley School District Personnel Commission is soliciting bids for a classification and compensation study for all classified positions. It is planned to begin in 2016, but the preferred start time is to be determined.

Our last study, performed by Ewing and Associates, was completed in 1996.

The objectives of the study are as follows:

1. Conduct a thorough job analysis of all classified positions in the represented and confidential units.
2. Prepare and update class specifications for all included classifications, including the following elements:
 - 2.1 Class title
 - 2.2 Definition or major reasons for the class
 - 2.3 Distinguishing characteristics – if part of a series or if one or more closely related classifications exist.
 - 2.4 Examples of duties – with essential functions delineated
 - 2.5 Supervision – given and received
 - 2.6 Employment standards – minimum requirements including
 - 2.6.1 knowledge of
 - 2.6.2 ability to
 - 2.6.3 identification of typical experience and education
 - 2.6.4 identification of any required licenses and/or certifications
 - 2.7 Desirable qualifications
 - 2.8 Working conditions - including:
 - 2.8.1 environment
 - 2.8.2 physical abilities – In accordance with accepted ADA requirements

3. Prepare specific recommendations with supporting rationale for an overall classification plan (covering the affected classifications) including the assignment of individual positions to classes. The Commission wishes to adhere to broad based generic classes wherever appropriate and the provision of clearly delineated career paths.

4. Conduct a salary survey/compensation study of the following school districts having similar classes to make recommendations for allocating the various series of classifications to appropriate salary ranges with the district's existing or extended salary schedule:
 - Anaheim
 - Buena Park
 - Centralia
 - Cypress
 - Fullerton
 - Huntington Beach
 - La Habra
 - Magnolia
 - Ocean View
 - Savanna
 - Westminster

5. Develop a manual detailing the methodology of the study and providing guidance on future classification actions and maintenance of the study results to be used by the Personnel Commission professional staff.

PROPOSED TIME-LINE FOR THE STUDY

| | |
|--------------------------------------|-------------------|
| Mailing of the Request for Proposals | October 9, 2015 |
| Deadline for submission of proposal | November 6, 2015 |
| Review of the proposals | November 19, 2015 |
| Initiation of the study | To be determined |
| Completion of the study | To be determined |

BACKGROUND INFORMATION

The Fountain Valley School District (FVSD) is located in northern Orange County. Its boundaries include most of the city of Fountain Valley, as well as part of Huntington Beach. The district provides services for students in the kindergarten through 8th grade. FVSD operates seven K-5 schools and three 6-8 middle schools. The current enrollment is about 6,300 students.

The district has operated with a merit system form of classified personnel since 1967. There are approximately 350 classified employees in three units, represented, confidential, and management. Of these, 76 classifications are represented by CSEA, six are confidential, and the other ten are management. The represented unit is part of the California School Employees Association (CSEA) Chapter 358. The collective bargaining agreement provides for an agency shop.

SCOPE OF THE STUDY

Classifications to be included in the study and the number of incumbents in each are listed as Attachments A – C.

ELEMENTS OF THE STUDY

1. Basic classification discussion/training with representative members of the district, CSEA and Personnel Office.
2. Orientation meetings for all affected employees to explain the process and distribute classification questionnaires. The number of orientation meetings will be determined in consultation with the selected firm. Originals of any materials needed for orientation sessions provided by the consultant and reproduced by the district.
3. Original job analysis questionnaires and/or other study documents to be provided by consultant and reproduced by the district.
4. Employee interviews conducted in the field or in small groups of job-alike employees. Interviews shall include:
 - a. 100% of single position classes
 - b. 50% of classes with less than 6 incumbents
 - c. 30% of classes with 6 to 15 incumbents
 - d. 20% of classes with 16 to 30 incumbents
 - e. 15% of classes with 31 or more incumbents
 - f. 100% of employees requesting an interview
5. Order of review of classifications to be determined in consultation with the Human Resources Director.
6. Meetings with management as needed (Human Resources Director, Superintendent, Senior Managers).

7. Classification methodology to be employed by the consultant needs to be applicable to all classes to be studied and clearly delineated in a maintenance manual to be used for future classification actions and update/maintenance of the study by the Director, Human Resources.
8. A draft classification plan must be received and a review of the appeals must be accomplished before finalization of the plan.

SALARY STUDY

Salary study using comparable and relevant employers listed in #4 on page 2 of this RFP; identification of benchmark classes and development of a salary plan with specified recommended internal relationships. The salary study will be based upon appropriate sources of internal and external data, and should be made using 2015-16 year data.

PROPOSAL CONTENT

1. Qualifications of contractor
 - 1.1 Description of organization – type and size
 - 1.2 Description of recent projects similar to this study, including at least five client references with name, title, addresses and telephone numbers of the contact person.
 - 1.3 Qualifications of individual(s) who will be assigned to this study and their role(s) in the work
2. Methodology – Briefly describe:
 - Overview of elements or steps in your plan of action
 - Evaluation method(s) you recommend to be used in the job analysis and job comparisons for this study
 - Establishment of benchmark positions.
 - Method/plan for recommendation of allocation of positions to the salary schedule.
3. An approximate timetable for all phases of the study.
4. A recommended review/appeals process for incumbents and district representatives including the roles of you firm in this process
5. Plans and recommendations for employee input and feedback to ensure employee participation and access.
6. Total cost to complete the study and delivery of all documents (three hard copies and one electronic copy) including all expenses related to travel, lodging, and meals.
7. Provision of necessary materials (in the form of a maintenance manual) to allow district HR staff to maintain the study in future years.

DEADLINE FOR PROPOSALS

Proposals must be received in the Personnel Commission Office no later than 4:30 pm on November 6, 2015. E-mailed proposals are an acceptable form of submission – submit to hesslerr@fvsd.us. Mailed in proposals should be sent to Fountain Valley School District – Personnel Commission, 10055 Slater Ave., Fountain Valley, CA 92708.

METHOD OF SELECTION AND AWARD OF PROJECT

A committee consisting of representatives from the district, CSEA, and personnel will review the proposals submitted and may hold interviews to clarify various aspects of the proposals submitted. The decision will be based on several factors including cost of the study, reference check of prior clients, and quality the proposal submitted. The committee will make a recommendation for consideration to the Personnel Commission, which will award the project.

Upon award of the classification study project, the selected firm will be required to sign a District Services Contract and provide any required insurance certificates to the district. The selected firm's proposal will be attached to the Services Contract as the Scope of work statement.

METHOD OF PAYMENT

The firm selected by the Personnel Commission to perform the classification/compensation study will be paid as follows:

- 1/3 at completion of Part 1 of the project (classification study review and appeals)
- 1/3 at completion of Part 2 of the project (compensation review data presented)
- 1/3 at completion of project (final reports presented to Personnel Commission)

CONTACT PERSON

Questions regarding this Request for Proposal should be directed to:
Ross Hessler – Director, Human Resources
Fountain Valley School District
10055 Slater Ave.
Fountain Valley, CA 92708
714-843-3266

9

Fountain Valley School District

Proposal to Conduct a Classification Study & Compensation Survey

November 2015

Prepared by:

RSC

REWARD STRATEGY GROUP

12707 High Bluff Drive, Suite 200, San Diego, 92130

(858) 259-3800 ■ Fax (858) 792-7465

www.rewardstrategy.com

TABLE OF CONTENTS

Section 1 – RSG’S Qualifications 1

Section 2 – Methodology 6

Section 3 – Timing of the Study 8

Section 4 – Study Costs 9



SECTION 1 – RSG’S QUALIFICATIONS

This proposal section contains four elements:

- ◆ A description of the firm
- ◆ RSG’s experience with classification and compensation studies.
- ◆ Relevant references and examples of similar projects
- ◆ Project Team

FIRM DESCRIPTION

Legal Name: Reward Strategy Group, Inc. (a California corporation)
Address: 12707 High Bluff Drive, Suite 200, San Diego, CA 92130
Telephone: (858) 259-3800 Fax: (858) 792-7465
Firm Owners: Allan Crecelius, President Sandra Comrie, Executive Director
Primary Contact: Allan Crecelius, President Email: acrecelius@rewardstrategy.com
Website: www.rewardstrategy.com

RSG’S EXPERIENCE

Reward Strategy Group, Inc. (RSG) is a California corporation founded in 1987 by three principals who came together from other large consulting firms. RSG has been in continuous, successful operation since its founding.

Over the past 28 years, we have successfully served more than 300 client organizations throughout the public, private, not-for-profit and education sectors. Classification and compensation are the firm’s **core practice areas**. The firm’s principals, Allan Crecelius and Sandra Comrie, are recognized experts in position classification processes and compensation plan design and administration. We have accrued a depth of experience in these disciplines that is equaled by few other consultants.

RSG is extremely well qualified to perform the work needed by the Fountain Valley School District. We have an excellent understanding of educational organizations, the job content of their classifications and the dynamics of their human resources management programs.

In a typical year, approximately half of our consulting is with cities, counties, educational institutions and special districts in the western United States. It is indicative of the value we bring to consulting engagements that dozens of organizations have retained us repeatedly over the course of many years for new projects.

REFERENCES

- ◆ Compton Unified School District
501 S. Santa Fe, Compton, CA 90221
Mr. Laurence Adams, Senior Director – Personnel Commission
Phone: (310) 604-6520, ext. 46520 Email: ladams@compton.k12.ca.us
Study description: Salary survey of all classified jobs.

- ◆ Huntington Beach City School District
17011 Beach Blvd. Suite 560, Huntington Beach, CA 92647
Ms. Patricia Hager, Assistant Superintendent, Human Resources
Phone: (714) 378-2020, ext.2020 Email: phager@hbcsd.us
Study description: Classification and total compensation analysis for all classified positions.

- ◆ Montebello Unified School District
123 S. Montebello Blvd., Montebello, CA 90640
Ms. Rachel Shaw, *former* Director – Classified Personnel
Phone (cell): (805) 607-7170 Email: rachel@shawhrconsulting.com
Study description: Full classification and compensation study covering all classified positions.

- ◆ Palomar Community College District
1140 W Mission Rd, San Marcos, CA 92069
Ms. Shawna Cohen, Senior Human Resources Analyst
Phone: (760) 744-1150, ext. 2608 Email: scohen@palomar.edu
Study description: Classified and compensation study for all classified positions.

- ◆ Long Beach Community College District
4901 East Carson Street, Long Beach, CA 90808
Ms. Pam Axup – Manager, Human Resources
Phone: (562) 938-4393 Email: paxup@lbcc.edu
Study description: Full classification and compensation study covering all 1,300 classified positions.

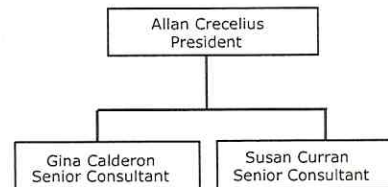
EXAMPLES OF OTHER RELEVANT PROJECTS

- ◆ Orange County Department of Education — Complete classification and compensation study of 815 positions in the department’s classified, confidential and supervisory classes.
- ◆ Rio Hondo Community College — Classification study and compensation analysis of all the college’s classified positions.
- ◆ Oxnard School District — Classification and compensation study of all classified management, confidential and bargaining unit positions.
- ◆ Berkeley Unified School District — Classification and internal compensation alignment study of all classified management, confidential and bargaining unit positions.
- ◆ Ontario-Montclair School District — Classification and compensation study for all classified positions.
- ◆ National University — Total compensation analyses and plan design recommendations for the college’s management positions.
- ◆ San Diego State University — Salary plan analysis and update for all management positions.

RSG’S PROJECT TEAM FOR THE STUDY

The consultant team RSG will dedicate to the District’s classification and compensation study is very highly qualified and has many years of experience working together to ensure high-quality study results.

Project Manager Allan Crecelius
 Project Consultant Gina Calderon
 Project Consultant Susan Curran



- ◆ Allan Crecelius is RSG’s President and has 37 years of classification and compensation consulting experience. He will be the overall engagement manager, ensuring the accuracy and effectiveness of all study processes and the quality of the study’s deliverables. He will play an active role throughout the engagement with FVSD and will lead the compensation survey and salary plan improvement analysis/ recommendations.
 - ◆ Gina Calderon, a Senior Consultant in RSG, will lead the classification plan analyses and compensation data gathering and will assist Mr. Crecelius with the benchmark job comparability analyses critical to the compensation survey phase.
 - ◆ Susan Curran, a Senior RSG Consultant, will participate in the classification portion of the study.
- Detailed resumés for the consultants follow.

Allan Crecelius has been the President of RSG since the firm's founding in 1987. He has 37 years of experience in management consulting with a focus on executive and staff compensation, strategic planning, performance management, organization effectiveness and position classification. His consulting projects have ranged from studies for *Fortune 500* companies to engagements with small or start-up entities. He has significant experience across a number of industry sectors, including educational, financial, technology, utility, service, not-for-profit and governmental. He has worked with executives, managers, governing boards and elected officials in more than 300 organizations.

He brings a range of experience and technical expertise to client engagements that lead to customized solutions and dramatic improvement in the organization's programs. He has assisted a large number of enterprises to better execute their strategies by operationalizing how they define performance, deliver service and reward success. Over the course of his career, Mr. Crecelius has successfully managed very large (seven-figure budgets), multi-disciplinary consulting engagements, down to small projects with clients of modest size.

Prior to becoming RSG's President in 1987, Mr. Crecelius was the Managing Partner–Western Region for Sibson & Co., Inc., a nationally recognized compensation consulting firm. With Sibson, he was responsible for managing staff in four offices and leading the firm's consulting practice in executive compensation and organization effectiveness. Previously, Mr. Crecelius was the Vice President–General Consulting for the Hay Group, an international human resources consulting firm.

Mr. Crecelius received a Bachelor of Science degree in Engineering from the United States Military Academy at West Point in 1968 and served as an officer in the U.S. Army for 10 years, holding key leadership positions in both combat and peacetime. He is frequently retained as a speaker in national/regional symposiums on planning, organization and compensation issues. He is the author of a number of articles and the co-author of the 1994 book, *Strategic Management — Creating Your Organization's Future*.

As noted, Mr. Crecelius has provided consulting expertise to over 300 organizations, including National University, San Diego State University, Thomas Jefferson School of Law, Rio Hondo College, Long Beach Community College District, Palomar Community College District, Los Angeles County Office of Education, Orange County Department of Education, Berkeley Unified School District, Montebello Unified School District and Compton Unified School District.



Gina Calderon, Senior Consultant, has over 25 years of business experience in Southern California. Her management consulting focus includes market research/surveying, organizational analysis, strategic business planning, job analysis/classification and reward system design. She has performed key, senior consulting roles on many of RSG's consulting projects with both public and private sector organizations.

Prior to joining RSG eight years ago, Ms. Calderon held responsible senior management positions in both for-profit and not-for-profit enterprises. Ms. Calderon graduated from the University of California, Los Angeles in 1989 with a Bachelor of Arts degree in Economics and received an MBA from UCLA's Anderson Business School.

A few of her most recent clients include National University, San Diego State University, Palomar Community College District, Compton Unified School District and Huntington Beach City School District.



Susan Curran, Senior Consultant, has worked with RSG for ten years. She has led or participated in numerous public sector consulting projects focused on position classification analysis. Prior to becoming a consultant, Ms. Curran worked in a series of responsible human resources management positions for 30 years with the County of Los Angeles.

Her current active clients include the County of Los Angeles, San Bernardino County Superior Court, Santa Margarita Water District and Palomar Community College District. Ms. Curran's past classification project experience includes Berkeley Unified School District, Long Beach Community College District, Oxnard School District and Orange County Department of Education.



SECTION 2 – METHODOLOGY

SCOPE OF THE STUDY

The District currently has 76 classifications represented by CSEA and six confidential classifications providing service to seven K-5 schools and three 6-8 middle schools. This study encompasses all classified positions in the represented and confidential units.

RSG'S APPROACH TO CLASSIFICATION

Our consultants will collect and confirm job content information, conduct a rigorous assessment of classification system design alternatives, develop an updated classification structure, improve titling protocols, prepare job descriptions, and allocate all studied classified positions into the appropriate salary ranges in the existing or new class structure.

RSG'S APPROACH TO COMPENSATION

RSG's approach to public sector surveying is to obtain complete salary structures, organization charts, operating budgets and classification documents from the comparison agencies and perform benchmark job comparability analyses, building an accurate salary survey database for appropriately comparable marketplace jobs for each District benchmark. We utilize a whole job measurement system to determine appropriate internal salary relationship guidelines. RSG will recommend competitive and equitable salary grade/range assignments for every classification in the study.

STUDY WORK PLAN

The study will be conducted in two phases:

- Phase A – Classification Study
- Phase B – Compensation Survey

Phase A – Classification Study

- ◆ Gather and review all pertinent District background information.
- ◆ Conduct initial meetings at the District with the Human Resources Director, Superintendent, Personnel Commission, administration/management, CSEA representatives and any other appropriate forums.
- ◆ Prepare a *Position Description Questionnaire* (PDQ) to be used in the classification study and gain District approval.
- ◆ Conduct a series of employee orientation meetings to explain the study, distribute PDQs and instruct employees on PDQ completion.
- ◆ Prepare a *Manager/Administrator Supplement* to facilitate supervisory review of completed PDQs.
- ◆ Collect and read/review all completed PDQs and supplements.

- ◆ Schedule and conduct onsite job analysis interviews with employees from every studied classification. For classifications with a large number of incumbents, RSG will conduct group job analysis interviews with a sample of employees in each class and assignment, as specified in the District's RFP.
- ◆ Perform classification plan analyses based on input from background material, PDQs/Supplements, and job analysis interviews. Prepare, document and forward a *Preliminary Classification Plan* findings and recommendations report.
- ◆ Review/discuss the preliminary report with appropriate individuals/groups.
- ◆ Finalize improved classification plan.
- ◆ Prepare new draft job descriptions for all classes and provide drafts to the District for review/ input.
- ◆ Assist the District in communicating RSG's classification recommendations. RSG will develop an employee appeals process and participate in resolving any appeals. The consultants will provide written recommendations on all employee appeals.
- ◆ Finalize the job descriptions and the classification phase of the study.
- ◆ Prepare an instruction manual and provide guidance to appropriate HR staff for ongoing maintenance of the classification plan.

Phase B – Compensation Survey

- ◆ Gain agreement on the compensation survey plan, including the District's eleven identified school districts and the District benchmark classes to be surveyed.
- ◆ Conduct the survey. Gather comparison organizations' classification and salary so RSG can perform benchmark job comparability analyses and build an accurate salary survey database.
- ◆ Document survey findings and results of the District's competitiveness and present/discuss with the District. Our consultants will prepare data sheets, charts and tables displaying the competitive market pay practices for the surveyed benchmark classes.
- ◆ Conduct internal classification relationship analysis and document results.
- ◆ Recommend allocation of all classifications to the appropriately competitive range, based on market data *and* internal relationships among classes.
- ◆ Present salary plan recommendations to the District, including study methodology, findings and recommendations into a final classification and compensation study report.
- ◆ Present and explain report to the Personnel Commission.



SECTION 3 – TIMING OF THE STUDY

| Study Element | Timing |
|--|-------------|
| ▪ Background data review. | Week 1 |
| ▪ Initial series of meetings. | Weeks 2-3 |
| ▪ PDQ preparation; employee orientation meetings. | Week 4 |
| ▪ Completed employee PDQs due to supervisors/administrators. | Week 6 |
| ▪ Administrator Supplements completed. | Week 8 |
| ▪ RSG receives and reviews all completed PDQs and Administrator Supplements. | Week 9 |
| ▪ Employee job analysis interviews scheduled. | Week 10 |
| ▪ Employee job analysis interviews conducted. | Weeks 11-13 |
| ▪ Classification plan analysis. | Weeks 14-15 |
| ▪ Present classification findings and preliminary recommendations. | Week 16 |
| ▪ Gain agreement on classification recommendations. | Weeks 17-18 |
| ▪ Prepare draft job descriptions. | Weeks 19-22 |
| ▪ Draft job descriptions reviewed by District management. | Weeks 23-24 |
| ▪ Employee notification process; timeframe for classification appeals. | Weeks 25-27 |
| ▪ Finalize classification plan; prepare maintenance manual. | Week 28 |
| ▪ Prepare and present salary survey plan. | Week 26 |
| ▪ Gather comparator data. | Weeks 26-28 |
| ▪ Conduct survey job comparability analyses; document survey results. | Weeks 29-30 |
| ▪ Review survey results with District. | Weeks 31-32 |
| ▪ Conduct internal job relationship analysis | Week 32 |
| ▪ Allocate classes into appropriate grades/ranges. | Weeks 33-34 |
| ▪ Present compensation plan recommendations. | Week 35 |
| ▪ Prepare/present final report. | Week 36 |



SECTION 4 – STUDY COSTS

The total not-to-exceed cost for the classification and compensation study including professional fees and all project expenses will be \$66,100.

CONSULTANT BILLING RATES

Consultant hourly billing rates for 2016 and for the duration of this project are shown below. These fees would apply to any additional work requested by the District outside the scope of this proposal.

| | |
|-----------------|-------|
| Allan Crecelius | \$200 |
| Gina Calderon | \$150 |
| Susan Curran | \$130 |



A PROPOSAL TO PERFORM A
CLASSIFICATION AND COMPENSATION STUDY
FOR

Fountain Valley School District

PRESENTED BY:



WILLIAM A. EWING, PRESIDENT
501 N. El Camino Real, Suite 200
San Clemente, CA 92672
949-366-4160

November 3, 2015



501 N. El Camino Real, Suite 210
San Clemente, California 92672
Phone: (949) 366-4160
Fax: (949) 366-4122
E-mail: bill@ewingconsulting.org

November 3, 2015

Ross Hessler
Director, Human Resources
Fountain Valley School District
10055 Slater Ave.
Fountain Valley, CA 92708

Dear Mr. Hessler:

Thank you for the opportunity to present our proposal to perform the classification and compensation study for Fountain Valley School District. We trust that our response to your request meets your needs.

Ewing Consulting specializes in providing human resources consulting services to the education industry throughout the State. We have considerable experience in the conduct of classification and compensation studies specifically for districts and will be pleased to assist Fountain Valley School District this sensitive and important endeavor.

Our firm is uniquely qualified to perform this study for you.

1. We understand districts, their organization, programs, codes, policies and practices. Our people are specialists in district human resources matters and each has performed similar studies in several projects throughout the State. We have completed studies for over 200 school districts in the State of California.
 2. Our approach to the study is specifically designed to provide a very thorough, technically sound result. Due to the central role of the class description in the entire personnel program, it is important to take care in preparing descriptions and allocating positions in an intelligent, objective manner.
 3. The engagement will be directed by Mr. Ewing in an effort to properly control and assure the quality and responsiveness of the engagement. His style is one of establishing and maintaining rapport with people at all organizational levels. This is easily checked with former engagements in the public and private sectors. His references include work with bargaining units in several districts around the State of California. Our consultants are accustomed to dealing with management level people and are highly qualified, effective and credible before employee and management groups as well as Boards and Commissions.
-

-
4. Much of our project work will be on-site. In order to enhance communications and do a proper job of understanding your organization's operations, our work will be largely at your offices and work sites where we will be accessible to your employees and the Human Resources Department.

We believe our proposal meets the requirements specified in the Request for Proposal. Our proposal is divided into five sections.

Objectives and Scope
Work Plan and Methodology
Schedule, Staffing and Fees
Resumes of Project Personnel
References

We will be pleased to present the proposal orally and respond to any questions you might have. Thank you again for your consideration.

Very truly yours,

William A. Ewing
President

TABLE OF CONTENTS

| | PAGE |
|---|-------------|
| <u>OBJECTIVES AND SCOPE</u> | 1 |
| <u>WORK PLAN AND METHODOLOGY</u> | 2 |
| <u>SCHEDULING AND INTRODUCTION OF THE STUDY</u> | 3 |
| <u>ORIENTATION TO CLASSIFICATION AND COMPENSATION PRACTICES</u> | 4 |
| <u>COLLECTION AND INITIAL ANALYSIS OF POSITION INFORMATION</u> | 5 |
| <u>REVIEW OF CURRENT CLASS DESCRIPTIONS</u> | 6 |
| <u>FINALIZATION OF CLASSIFICATIONS</u> | 7 |
| <u>DEVELOPMENT OF INTERNAL RELATIONSHIPS</u> | 8 |
| <u>PREPARATION OF SALARY SURVEY QUESTIONNAIRE</u> | 9 |
| <u>CONDUCT OF THE SURVEY</u> | 10 |
| <u>RECOMMENDATIONS REGARDING THE OVERALL PROGRAM</u> | 11 |
| <u>PRESENTATION OF THE FINAL REPORT</u> | 12 |
| <u>SCHEDULE, STAFFING AND FEES</u> | 13 |
| <u>PROJECT SCHEDULE</u> | 14 |
| <u>DESCRIPTION OF FIRM</u> | 15 |
| <u>STAFF QUALIFICATIONS</u> | 16 |
| <u>WILLIAM A. EWING</u> | 16 |
| <u>WILLIAM (BJ) EWING</u> | 17 |
| <u>GLENN SIEGEL</u> | 18 |
| <u>SUZANNE ANSARI</u> | 19 |
| <u>CLIENTS</u> | 20 |

OBJECTIVES AND SCOPE

Based on our understanding of your Request for Proposal, the objectives of the study will be as follows:

Prepare class descriptions which accurately describe current duties and responsibilities and requirements for approximately 76 CSEA, 6 Confidential and 10 Classified Management classifications.

Allocate all (approximately 350) employees to the classifications as described.

Perform a salary survey of selected public sector organizations, focusing on comparable districts.

Assure compliance of class descriptions with the Americans with Disabilities Act.

Provide specific recommendations regarding the appropriate level of compensation for all classes.

Provide a carefully described and valid method for arriving at future determinations of base salary.

Provide recommendations to update and administer the program including training in the use of any new aspects of the overall program.

Recommend other work flow, management practices, policies and procedural changes based on this thorough review of the organization.

WORK PLAN AND METHODOLOGY

Our experience in the conduct of similar studies indicates that the best results are achieved through a series of phases, each phase having one or more elements. The phases would be separate in performance but interdependent in overall effect and meaning. The phases and elements would be planned and carried out to maximize study value to District personnel. The phases would allow the District to properly follow study progress and assess its timeliness.

There are several features to our work plan which are key ingredients for a successful study. A classification study is very sensitive for all concerned. It is vitally important to establish methods to reduce apprehension and assure fair and responsive treatment for those employees whose jobs are being studied. Our work plan includes several steps which enhance the opportunity for a successful study.

- Advisory Committee - We have found that the use of an Advisory Committee in these studies is important to the final acceptance of the program. This is typically a group of five to nine people who represent the occupational groups and departments included in the study. The Committee is not asked to make decisions or vote on anything; rather, the Committee follows our study progress, provides feedback on employee's reactions to the study and our consultants, and assures themselves of an objective and independent report. We typically arrange four to five meetings with the Advisory Committee during the course of the study.
- Participation of Human Resource Department Staff - Our work plan includes several opportunities for discussions, training sessions and other communications to assure that the program may be maintained by the Human Resource Department.
- Participation of Union and Management Groups - Our work plan provides for meetings with the Superintendent, other key executives, the Board, Commission, union leadership and others (at your request) who would have an impact on study results or input to study findings. These communications are vitally important to the ultimate acceptability of study procedures and results.

Each major phase outlined in our Work Plan and Methodology section is outlined below. The order of their presentation is approximately the order of their performance. However, several phases may be carried out simultaneously to minimize expenses and to use available time most expeditiously.

In addition, we have included a Project Schedule which shows the timing of these phases.

PHASE I - SCHEDULING AND INTRODUCTION OF THE STUDY

This phase is extremely important to the ultimate success of the project. The purpose of Phase I is to introduce the study, communicate study methodologies and procedures, initiate effective communications, and explain the role and contributions of District employees. If the District desired, it would also be intended to develop a program for effective involvement of assigned persons from the District's Human Resource Department.

1. Meet with Advisory Committee and other groups to set the study in motion, reach agreement on key study procedures and methods, discuss and refine the project schedule, define roles and contributions of District employees and to clarify study scope and output.
2. Meet with Director, Human Resources and assigned staff to develop an effective method for including their involvement and input in the study.
3. Conduct meetings with the Superintendent and key department heads to introduce the study to them, to explain their function, role and contributions, to outline the study schedule, methodology and output, and to define time and effort involvement of their personnel; meet with union or other groups as necessary.

PHASE II - ORIENTATION TO CLASSIFICATION AND COMPENSATION PRACTICES

The purpose of Phase II is to develop detailed familiarity with the District's organization structure and its use of various positions and classifications among its departments. We would also become well-versed in the content of current classifications and levels, study current base salary levels and pay relationships and review District policies, practices and procedures related to classification and compensation.

1. Meet with management personnel to obtain basic information on nature and diversity of services and programs (on-line as well as planned), work activities and functions, organization structure, reporting relationships, and the kinds of positions operating in each department. We would ask them to relate concerns and issues related to the current classification and pay structure and the administrative guidelines governing it.
 2. Study and assess available material on the District's present system for classifying and compensating employees such as: classification, position guides or descriptions, base salary structures and related items.
 3. Examine and evaluate administrative procedures and practices related to compensation, and gather data on the methods used to set and revise salaries for the classifications included in the study.
 4. Review local or State rules and regulations and laws which impact on classification practices.
 5. Meet with Advisory Committee to provide feedback on findings and to seek input on the format for the class descriptions and other related items.
-

PHASE III - COLLECTION AND INITIAL ANALYSIS OF POSITION INFORMATION

The purpose of Phase III is to systematically collect information related to the basic duties, responsibilities, reporting relationships and tasks of positions of involved departments. The procedure involves the use of a standard position information questionnaire, interviews and worksite observations and conversations. We can assure you that our position analysis techniques meet the requirements of the Federal Uniform Guidelines on Employee Selection Procedures (1978) and the California Department of Fair Employment Regulations (1980).

1. Modify an existing position information questionnaire which, our experience has shown, captures position information in a reliable and efficient fashion. The form will be constructed to permit easy completion without sacrificing its value to subsequent position analysis.
 2. Review proposed questionnaire and its distribution and use with the Advisory Committee. Each participant would be asked to complete a questionnaire. Completed questionnaires would be reviewed by the employee's supervisor and sent directly to our consultants.
 3. Distribute questionnaire and explain it and the procedure for its completion and processing to all participants through meetings held with the employees. We believe this step is especially important since it gives all employees the opportunity to meet the consultants prior to the study and the opportunity to receive careful instructions on how to complete the questionnaire. We may wish to hold meetings at various locations around the District. We also provide for separate orientation sessions for supervisors who will be reviewing the questionnaires.
 4. Collect and analyze completed questionnaires.
 5. Conduct interviews with at least one incumbent per class and any employee who requests an interview. Interviews would normally last about thirty minutes and would consist of expansion of questionnaire responses and discussions regarding the relationships of the position to others in the organization. Some employees prefer group interviews which is fine with our consultants. We believe that any employee should be given the opportunity to be interviewed during this phase of the study.
-

PHASE IV - REVIEW OF CURRENT CLASS DESCRIPTIONS

The purpose of Phase IV is to complete our review of the existing class descriptions and suggest changes which better accommodate the positions described by each class description. The classifications will be prepared in such a manner as to specify the relationships between classes in a series.

1. Determine validity of current class descriptions based on questionnaire and interview analysis.
 2. Meet with the Director, Human Resources and others to determine an appropriate format for the revised class descriptions.
 3. Prepare revised descriptions as necessary, specify job duties, levels of responsibilities and skills, knowledge and abilities requirements. We will be sensitive to career ladders within and between series.
 4. Assure compliance of the class descriptions with the Americans with Disabilities Act. We will provide an assessment regarding "essential functions" together with statements regarding working conditions for each class. Working conditions refers to the environment in which the work takes place and the physical demands and hazards associated with the work.
 5. Allocate carefully all employees (approximately 350) to the proper classification and prepare an allocation listing summarizing our conclusions.
 6. Present our preliminary class descriptions and allocations to the Advisory Committee for review and discussion. We will highlight new, revised or eliminated classes with proper rationale for our recommendations. We will also provide listings of classes by family, series or occupational groups and will be sensitive to career ladders and bridge classes in the process.
-

PHASE V - FINALIZATION OF CLASSIFICATIONS

The purpose of Phase V is to provide feedback to employees and their supervisors as to the classification to which they have been allocated. We believe this step is essential to the ultimate success of the program. In this way, communications will be such that any employee may appeal a classification to which he or she has been allocated. We will be pleased to adopt whatever method of dealing with appeals is customary for the District.

We normally suggest the following process for consideration:

1. Provide each employee and supervisors with a copy of the class description recommended for the employee's position.
2. Provide a form to be completed by employees who do not agree with the classification recommended by the consultant.
3. Respond, in writing, to employees who provides feedback indicating what our final recommendation will be with regards to class title and description. At this point, we will only be dealing with appeals regarding recommendations dealing the classification element of the study. Our fee estimate includes any number of appeals received during the course of the study.

It is important to involve the consultant directly in the appeal process, and we will publish the final classifications where appropriate. We will be sensitive to career ladders and mobility as well as management succession and other organizational concerns.

PHASE VI - DEVELOPMENT OF INTERNAL RELATIONSHIPS

The purpose of this phase is to examine internal relationships between classifications based on the class descriptions and comparative levels of responsibility of each class. We will utilize organization analysis and quantitative position evaluation, if necessary, to properly rank the classes. We would be careful to employ proven methods of position evaluation, and would communicate the methodology in detail to the Advisory Committee to assure understanding and acceptance of our techniques.

1. Meet with the Director, Human Resources and others to discuss the full range of methods available to properly evaluate the relative level of each classification. We will be careful to propose methods which the District may utilize and maintain on an on-going basis.
 2. Evaluate all classes using the agreed-upon methodology and display the resulting rank order of all classes within families or occupational groups.
 3. Determine the appropriate relationship between classes in terms of percentages of salary and/or salary range differences.
 4. Compare recommended rankings and salary range differences with current practice.
 5. Present preliminary recommendations to the Advisory Committee and management to encourage discussion and feedback prior to finalization.
-

PHASE VII - PREPARATION OF SALARY SURVEY QUESTIONNAIRE

The purpose of Phase VII is to arrive at basic decisions regarding salary philosophy and pay practices. The internal relationships will be displayed and discussed with the Advisory Committee and others. Based upon acquired knowledge of the District's organization and practices, we will do the following:

1. Recommend participants to be included in a salary survey discussing this in detail with the Advisory Committee. We will match the District's size and service profile with that of participants, and will be specific as to which agencies should be included. We consider three criteria in selecting participants: the geographical area, some measure of size (population, number of employees, budget) and type of business (public sector, private sector). We carefully analyze each element and recommend a list of participants based solely on these criteria. This will be discussed in detail with you.
 2. Recommend benchmark classes for the survey. We will select representative and typically populous classes to be included in the survey. The benchmarks will include representation at all organizational levels and will be carefully selected to represent specific occupational groups and job families. These will be described in summary form for use in the survey questionnaire.
 3. Gather published survey data which may be helpful in our analysis.
 4. Prepare a survey questionnaire which will gather salary and other data if desired.
-

PHASE VIII - CONDUCT OF THE SURVEY

The survey instrument will be distributed to all participants with appropriate explanations as to the use and confidentiality of the data. Normally, we would also provide each participant with a copy of the final product (survey) to act as an inducement for participation.

1. Follow-up with survey participants as necessary to encourage thorough and accurate completion of the questionnaire on a timely basis.
2. Contact participants to ask questions regarding responses which appear unusual or point to inappropriate classification matching; arrive at decisions regarding the usefulness and comparability of data.
3. Compile survey results in tabular form and analyze data in light of current pay practices.

PHASE IX - RECOMMENDATIONS REGARDING THE OVERALL PROGRAM

The purpose of Phase IX is to come to well-reasoned recommendations regarding the compensation plan for the employees. Based on the data and analysis completed in earlier phases, we will do the following:

1. Recommend appropriate compensation ranges for each classification for the current year.
 2. Recommend a proper salary differential between classifications and their immediate subordinates through establishment of a complete salary range program to provide both internal equity and external competitiveness.
 3. Recommend alternative methods to implement the program. These studies typically have a certain cost associated with their implementation. We have learned a variety of methods to implement studies within the District's financial resources. We typically provide a number of options to set the stage for negotiations.
 4. Recommend districts and other organizations to be included in future surveys. We will include a recommended survey questionnaire and a list of participants based on the results of the study.
 5. Recommend a method to maintain and administer the salary program.
-

PHASE X - PRESENTATION OF THE FINAL REPORT

We will bring all the study results and recommendations together in a final report which will be presented in written form to the Advisory Committee, the Superintendent, the Board and Commission if desired. It is vitally important that the District review a preliminary draft of the report to assure that the written word communicates and covers all the specific areas of concern. The final report will include the following:

1. Class descriptions covering all the participants (approximately 92 classes).
2. Allocation listings placing all positions (approximately 350) into final recommended classifications.
3. Internal ranking of these classes together with complete descriptions of the methodology utilized to determine internal relationships.
4. Salary survey performed by Ewing Consulting and other data collected from published sources.
5. Recommended salary ranges for each classification together with descriptive material and rationale.
6. Other recommendations resulting from the study. In the past, we have commented on such matters as total compensation practice, attitudes and morale, organizational issues or concerns, staffing, training or suggestions aimed at improving efficiency or effectiveness of District functions.

Once the final report is delivered and accepted by the District, we will be available for follow-up consultation should you desire. Whether on-site or by telephone, we will make ourselves accessible to answer questions or provide additional commentary on our recommendations. Should you require assistance in implementing study recommendations, we would be pleased to assist the District on an hourly plus expense basis.

SCHEDULE, STAFFING AND FEES

As indicated in our work plan, we have included a schedule which is meant to show the timing relationships of the various phases of the study. The work plan itself identifies the expected outputs for each phase and includes several ideas for the timing of meetings with the Advisory Committee and others. We anticipate that we will work closely with the Director, Human Resources throughout the course of the study. We will be pleased to meet with you whenever the need arises at your suggestion or ours.

The staffing of an assignment such as this is a very delicate matter. Due to the nature of the work and its potential impact on all personnel, it is vitally important the engagement be performed by someone with wide experience as well as someone with ability to sell ideas with credibility, integrity and independence.

For these reasons, Mr. William A. Ewing will be conducting the study on behalf of his own firm and the Fountain Valley School District. He will act as Project Manager and will have overall accountability for the technical quality of the work, its responsiveness and communication. Mr. Ewing is a seasoned professional who now enjoys his own consulting firm after three years as a Personnel Director and thirteen years as a Principal Consultant for two large personnel consulting firms. His complete resume is included for your review. He will be pleased to have you check with any number of the references provided in his resume - references in either the public or private sector. These references include only assignments for which he accepted responsibility as Project Manager. There is no attempt to include other studies conducted by someone else.

Our fee for the conduct of this study as described herein for all positions in approximately 76 CSEA, 6 Confidential and 10 Classified Management classifications will be \$48,300.00 including out-of-pocket expenses. The estimate assumes that the District will provide graphics and printing services with respect to the questionnaires and study outputs.

EWING CONSULTING, INC.

DESCRIPTION OF FIRM

Mr. Ewing began his own consulting firm over 35 years ago. Prior to establishing the firm, Mr. Ewing was responsible for human resources consulting for the western region of what is now Ernst & Young and was a Director in the Los Angeles office of Hay Associates. Mr. Ewing is actively involved with his clients and personally directs the firm which continues to prosper largely due to his reputation in the fields of job evaluation, compensation planning, classification and organization planning.

Ewing Consulting specializes in public sector organizations and is especially well-known in the organization planning, classification and compensation fields in the education field. We maintain a staff of experienced consultants headquartered in nearby San Clemente.

Ewing Consulting has conducted several seminars for school districts on the subject of classification and compensation. We provide an overview of job evaluation programs available and focus on a variety of widely used internal equity systems.

Ewing Consulting specializes in a wide range of human resources services. The firm has performed hundreds of classification and salary studies specifically for school districts. Another popular product has been our human resources department audits which provide some helpful suggestions to school districts on improving the efficiency and effectiveness of their human resources processes.

STAFF QUALIFICATIONS

WILLIAM A. EWING

Bill Ewing, President of Ewing Consulting, began his consulting career 40 years ago with Ernst & Ernst (now Ernst & Young). He steadily moved up the professional ladder in the Denver, St. Louis and Los Angeles offices of this prestigious firm while serving major clients in the private and public sector in compensation, organization planning, human resources policies and training. He joined Hay Associates in Los Angeles as a Principal for two years before starting his own firm in 1980. Prior to his consulting career, he was Director of Human Resources for Carte Blanche Corporation, a national company with 1,000 employees headquartered in Los Angeles.

He is currently enjoying his 35th year serving primarily the education industry. Headquartered in the City of San Clemente, the Company's client list numbers over 200 school districts, 45 community college districts, 30 county offices of education and a number of other organizations. The firm also serves a large number of Cities, Counties and other public sector clients in California, Arizona, Kentucky and Washington as well as some very select private sector companies such as Northrop, Lockheed, Hughes, Warner Brothers and Architectural Digest.

Mr. Ewing is recognized nationally for his innovations in human resources including the Ewing Factor System, Harmony software, Organization Analysis methods (up, down, over and out) and others. He is a popular speaker at State, regional and national gatherings of educators and human resources people.

He taught for many years in the Human Resources Certificate Program at UCLA receiving recognition for his popular courses on compensation, job evaluation and general management. He also leads a variety of workshops around the country as well as his own two-day classification and compensation seminar.

Mr. Ewing holds Bachelor's and Master's degrees in psychology. He has studied with one of the great leaders in the field. He is very active in church and choral music activities and has served on the Board of Directors of both the Los Angeles Master Chorale and Pacific Chorale, two of the finest professional groups in the country. He is also a choral conductor himself having directed several choirs around the country. He currently serving as the President of the San Clemente Rotary Club.

Bill and his wife of 50 years, Diane, live in San Clemente and have raised three children, two of whom work for Ewing Consulting.

WILLIAM (BJ) EWING

William (BJ) Ewing will also participate as a team leader and member of the project team. Mr. Ewing is a graduate of California Lutheran University with a degree in Communication Arts with an emphasis in Business Administration. While attending the University, Mr. Ewing was a Student Senate Representative, served as Editor of the University newspaper and held office in several college organizations.

Over the past twenty-three years with the Company, Mr. Ewing has been involved with over 125 of our clients in classification and compensation studies. He has provided management training services and has become the firm's coordinator of ADA services.

BJ has performed over 100 salary and benefit surveys and is widely regarded for his knowledge of point factor systems, especially the EFS.

Mr. Ewing also serves as project director for numerous projects. His responsibilities include communication with clients, delegation of assignments to support staff and oversight to assure quality of work. He has established outstanding working relationships with our clients.

GLENN SIEGEL

For the past 36 years Glenn Siegel has worked for San Mateo County Office of Education's Personnel Commission. He began work there in 1979 as an Administrative Intern, and served in roles as Staff Personnel Analyst and Senior Personnel Analyst before being appointed as Personnel Director in 1989. Glenn holds a Bachelor's degree in Politics from St. Mary's College of California and a Master's degree in Public Administration. Glenn has extensive training and experience in the areas of employee recruitment and selection, classification and compensation, and HR program administration. He is valued as a statewide expert in these areas, and has conducted numerous seminars on a variety of HR management topics.

Prior to Glenn's employment with San Mateo County Office of Education, he held internship positions with Walnut Creek Police Department, and in the regional office of Congressmen George Miller.

During his tenure working with the Personnel Commission, Glenn has served multiple terms on both the CSPCA and SPCA/NC Boards, has chaired numerous state and regional conference planning committees, and has presented conference workshops on job analysis, classification and compensation, employment testing, and the role of a Personnel Commission Director. He wrote the monograph titled "Guidebook for the Selection of Personnel Commissioners" that outlines the requirements recruiting and appointing Personnel Commissioners, and includes materials for the assessment and selection of Commissioners. Glenn has served on numerous human resources department audit teams in his work with the state Fiscal Crisis Management Team, and is on the executive committee of the San Mateo County Schools Insurance Group. In 2005, he published a book titled "Human Resources Management Book of Letters".

In October 2010 Glenn received an "Outstanding Service to the Merit System" award presented by the School Personnel Commissioners association of Northern California for his 30 plus years of service to the Merit System.

Glenn has been married to Elizabeth Siegel for 30 years and has three children.

SUZANNE ANSARI

Suzanne Ansari will also participate as a member of the project team. Ms. Ansari is the firm's newest HR consultant/technical writer, she joined the team in 2014. Ms. Ansari holds a bachelor's degree in Speech Communication with a minor in Education. She graduated with cum laude honors from the University of Alaska-Fairbanks and was awarded a NCAA All Conference Academic award in Women's Basketball for her athletic and academic achievements. Suzanne completed her student teaching working with American Indian/Alaska Native special needs students.

Suzanne's human resources experience includes recruiting, training, program development, employee relations, benefits, safety and compliance issues. Ms. Ansari has had extensive hands-on experience working with special needs students during her tenure with the Orange County Office of Education. Suzanne has participated in several classification and compensation studies and has prepared hundreds of job descriptions.

Ms. Ansari currently serves on the Board of Directors for the Community Resource Center of San Clemente and the San Clemente Domestic Violence Task Force. She writes a monthly nonprofit spotlight newspaper column for the San Clemente Times. Suzanne is a member of the Orange County Veterans, Military and Families Collaborative and the Society for Human Resource Management (SHRM).

REFERENCES

Burbank Unified School District

Classification and Compensation Study
Anita Schackman
Director, Human Resources
1900 West Olive Ave., Burbank, CA 91506
(818) 729 – 4410

Cajon Valley Union School District

Classification and Compensation Study
Angela Bishop
Director, Classified Personnel
750 E. Main Street, El Cajon, CA 92022
(619) 558 – 3047

Palm Springs Unified School District

Classification and Compensation Study
La Sonya Brummell – Pitts
Director of Classified Personnel
980 E. Tahquitz Canyon Way, Suite 204, Palm Springs, CA 92262
(760) 416 – 6094

Santa Clara County Office of Education

Classification and Compensation Study
Philip Gordillo
Chief Human Resources Officer
1290 Ridder Park Drive MC265, San Jose, CA 95131 - 2304
(408) 459 – 6846

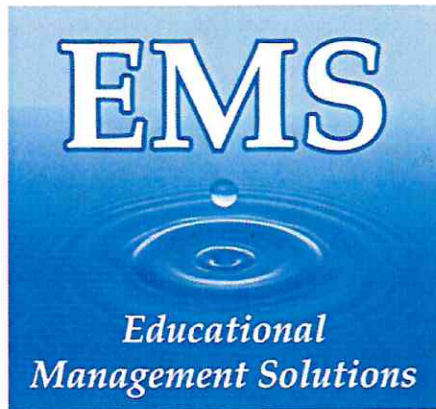
CLIENT LIST – SCHOOL DISTRICTS

ABC Unified School District
Acalanes Union High School District
Adelanto School District
Alameda Unified School District
Alum Rock Union Elementary School District
Anaheim City School District
Anaheim Union High School District
Antioch Unified School District
Apple Valley Unified School District
Arcadia Unified School District
Auburn Union School District
Barstow Unified School District
Bassett Unified School District
Bellflower Unified School District
Berkeley Unified School District
Big Creek Elementary School District
Bonita Unified School District
Brawley Union High School District
Brea-Olinda Unified School District
Buena Park Elementary School District
Burbank Unified School District
Cabrillo Unified School District
Cajon Valley Unified School District
Calexico Unified School District
Campbell Union School District
Capistrano Unified School District
Carlsbad Unified School District
Caruthers Unified School District
Central Unified School District
Centralia Elementary School District
Chaffey Union High School District
Charter Oak Unified School District
Chico Unified School District
Chino Unified School District
Claremont Unified School District
Clark County School District
Clovis Unified School District
Colton Joint Unified School District
Colton-Redlands-Yucaipa ROP
Compton Unified School District
Corona - Norco Unified School District
Coronado Unified School District
Covina Valley Unified School District
Cucamonga School District
Culver City Unified School District
Del Mar Union School District
Del Norte County Unified School District
Delano Union Elementary School District
Delano Union High School District
Desert Sands Unified School District
Dixie School District
Downey Unified School District
Durham Unified School District
Eagles Peak Charter School
Earlimart School District
El Monte Union High School District
El Segundo Unified School District
Elk Grove Unified School District
Encinitas Unified School District
Escondido Union Elementary School District
Evergreen Elementary School District
Woodland Joint Unified School District
Fort Wayne Community Schools
Fountain Valley School District
Fowler Unified School District
Franklin-McKinley Elementary School District
Fremont Union High School District
Fresno Unified School District
Glendale Unified School District
Glendora Unified School District
Goleta Union Elementary School District
Grant Union High School District
Guadalupe Unified School District
Guajome Park Academy
Hacienda La Puente Unified School District
Hawthorne Unified School District
Hayward Unified School District
Hermosa Beach City School District
Huntington Beach City School District
Huntington Beach Union High School District
Inglewood Unified School District
Irvine Unified School District
Jefferson Elementary School District
Jefferson Unified High School District
Jurupa Unified School District
Kings Canyon Unified School District

Kingsburg Joint Union High School District
La Habra City Schools
La Mesa-Spring Valley Unified School District
La Puente Valley Regional Occupational Program
Lake Tahoe Unified School District
Las Virgenes Unified School District
Lawndale Elementary School District
Le Grand High School District
Lodi Unified School District
Lompoc Unified School District
Lone Pine Unified School District
Long Beach Unified School District
Los Alamitos Unified School District
Los Angeles Unified School District
Lynwood Unified School District
Manteca Unified School District
Mariposa Unified School District
Merced City School District
Mesa Unified School District
Metropolitan Education District
Montebello Unified School District
Moreland School District
Morgan Hill Unified School District
Mt. Diablo Unified School District
National School District
Needles Unified School District
New Haven Unified School District
Newhall Elementary School District
Newport-Mesa Unified School District
Novato Unified School District
Oakland Unified School District
Ojai Unified School District
Ontario-Montclair Elementary School District
Orcutt Union Elementary School District
Oxnard Elementary School District
Oxnard Union High School District
Pajaro Unified School District
Palisades Charter High School
Palm Springs Unified School District
Palmdale Elementary School District
Palo Alto Unified School District
Palos Verdes Peninsula Unified School District
Paramount Unified School District
Pine Ridge Elementary School District
Pittsburg Unified School District
Placentia-Yorba Linda Unified School District
Placer Union High School District
Pleasant Valley School District
Point Arena Joint School Districts
Pomona Unified School District
Portland Public Schools
Poway Unified School District
Ravenswood City School District
Redondo Beach Unified School District
Redwood City Elementary School District
Richmond Unified School District
Rim of the World Unified School District
Ripon Unified School District
Riverside Unified School District
Rowland Unified School District
Sacramento City Unified School District
San Bernardino City Unified School District
San Diego City Unified School District
San Dieguito Union High School District
San Jose Unified School District
San Juan Unified School District
San Lorenzo Valley Unified School District
San Luis Coastal Unified School District
San Marino Unified School District
San Ramon Valley Unified School District
San Ysidro School District
Sanger Unified School District
Santa Ana Unified School District
Santa Barbara Elementary/High School Districts
Santa Clara Unified School District
Santa Maria Joint Union High School District
Santa Maria-Bonita School District
Santa Monica-Malibu Unified School District
Santa Paula Elementary School District
Santa Rosa Unified School District
Santa Ynez Valley Unified School District
Shasta Union High School District
Sierra Sands Unified School District
Silver Valley Unified School District
Solana Beach Unified School District
Somis Union Elementary School District
South Bay Union School District
South San Francisco Unified School District

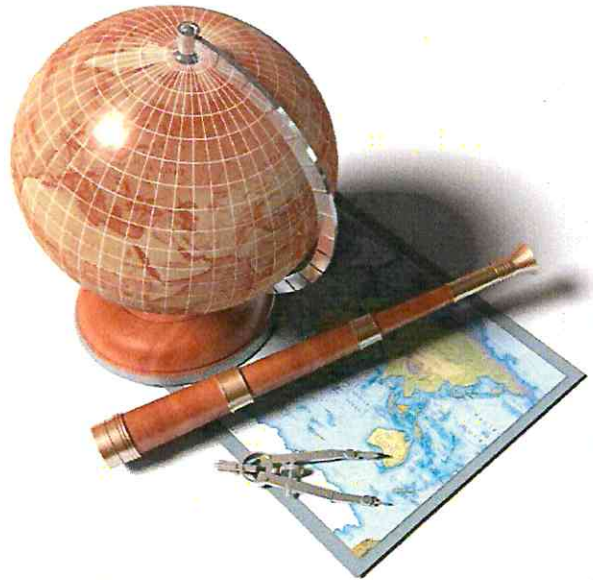
Stockton Unified School District
Sulphur Springs Union Elementary School District
Sunnyvale Elementary School District
Sweetwater Union High School District
Taft Union High School District
Temple City Unified School District
Torrance Unified School District
Tri-Cities Regional Occupation Program
Tustin Unified School District
Union School District
Upland Unified School District

Valley Regional Occupational Program
Ventura Unified School District
Victor Valley Union High School District
Visalia Unified School District
Vista Del Mar Union Elementary School District
Walnut Valley Unified School District
Weatherly Area School District
Weaver School District



Educational Management Solutions

Helping
Schools Navigate
the Ever
Changing World
of Human
Resources



Proposal

Comprehensive Classification and Compensation Study
Job Description, Legal Compliance and Strategic Compensation Design
For

Fountain Valley School District

Preparing today's youth for tomorrow's future

EMS California Office
P.O. Box 1290 – Murphys, CA 95247
(855) 840-2100 www.emsaccess.com

Your partner in building effective HR Solutions

Fountain Valley School District

Comprehensive Classification and Compensation Study

PROPOSAL CONTENTS

| | Page |
|---|------|
| Cover Letter | |
| Introduction / Qualifications | |
| Introduction | 2 |
| Company Background | 3 |
| Similar Projects / References | 4 |
| Project Staff | 5 |
| Scope of Work (<i>Project Methodology</i>) | |
| Benefits of the EMS Approach | 6 |
| Detailed Description of Methodology | 7 |
| Planning | 7 |
| Job Analysis | 8 |
| Compensation Structure Analysis | 10 |
| Job Valuation | 10 |
| Market Survey | 10 |
| Strategic Compensation Design | 11 |
| Report Development | 11 |
| Final Recommended Job Descriptions | 12 |
| Software Application | 12 |
| Project Integration | 13 |
| Project Timeline | 14 |
| Recommended Appeals Process | 16 |
| Ongoing Maintenance of Jobs | 18 |
| Cost | 19 |
| Sample Forms & Reports | |

Submitted By
Fred Corn
Educational Management Solutions
Murphys California
(855) 840-2100

Branch Offices: CA, CT, KS, MD, MO, NM, WA, WY

Introduction / Qualifications

Educational Management Solutions

A recognized leader in consulting, training and software solutions specifically targeted to meet the Human Resource needs of school systems across the Nation. Exclusively working with public school systems since 1997, EMS clients have included hundreds of school systems throughout the United States. EMS has an unmatched breadth of expertise gained from previous work in both the private and public sectors. Further, we have combined this experience in personnel management, compensation planning, employment regulations, and workers compensation with leading edge computer technology to provide school systems solutions in the development, analysis, management and uses of job information.

Name: Educational Management Solutions
Structure: Limited Liability Company (LLC)
Home Office Address: 119 W Iron
2nd Floor
Salina, KS 67401
California Office: P.O. Box 1290
Murphys, CA 95247
Contact Information: Email – support@emsaccs.com
Phone – 1 (209) 728-2100
Date Established: 1992
Submitted By: Fred Corn & Matt Spencer

**Accurate, defensible
and understandable
job information &
compensation
structures provide the
basis for virtually all
Human Resource
decisions.**



Company Background and History

Educational Management Solutions (EMS) is recognized as a leader in providing consulting, training and software solutions specifically targeted to meet the Human Resource needs of educational systems across the Nation. Exclusively working with educational systems since 1997, EMS clients have included educational systems throughout the United States. EMS has an unmatched breadth of expertise gained from previous work in both the private and public sectors. The staff of EMS, having practical day-to-day experience in the management of school human resource departments, understands the needs of educational systems. Further, EMS has combined this experience in personnel management, compensation planning, employment regulations, and workers compensation with leading edge computer technology to provide educational systems solutions in the development, analysis, management and uses of job information.

National Company with California Roots

EMS was founded in and is still primarily operated from California. EMS has successfully performed services similar to those requested for dozens of California educational systems. Further, EMS has recently provided (or is currently providing) job classification process, market analysis and strategic salary structure planning for Alameda COE, Barstow Schools, Castro Valley Schools, Centinela UHSD, Fremont Unified, Livermore Schools, Lompoc Schools, Palmdale Schools, San Diego COE, San Lorenzo Schools, San Leandro Schools, Shasta COE, and Vista USD. These local and regional roots provide EMS a uniquely in-depth understanding of the culture and needs of California community colleges and K-12 Educational systems.

EMS's national presence includes locations in California, Washington, Wyoming, Kansas, Missouri, New Mexico, Georgia, and Maryland.

Education Based HR Expertise

The significant amount of school based human resource knowledge, experience and expertise allows EMS staff to provide a wide range of effective, efficient and legally compliant human resource solutions and realistic implementation strategies. EMS staff members have decades of experience in educational system human resource administrative roles. This experience provides EMS with an outstanding understanding of the unique culture and needs of educational systems.

Building Partnerships to Find Solutions

EMS strongly believes in a partnering approach that allows us to truly understand the specific needs of your District. Further, our in-depth collaboration with District staff allows us to more effectively and efficiently solve problems and create realistic implementation strategies that meet the specific needs of the District. From our client-centered planning sessions and communication processes to our comprehensive on and off-site research, needs assessment, training and client support teams, EMS can provide a level of comprehensive assistance that truly is unmatched.

Similar Projects / References

Following is a list of several references of school systems that have had re-classification studies performed by Educational Management Solutions.

- Castro Valley School District**
Contact: Sherri Beetz (510) 537-3000
Director of Human Resource
4400 Alma St, Castro Valley, CA 94546
- Livermore Valley Joint School District**
Contact: Yolanda Holms (925) 606-3268
Executive Director of Human Resources
685 East Jack London Blvd, Livermore, CA 94551
- San Diego County Office of Education**
Contact: Michele Fort-Merrill (858) 292-3588
Assistant Superintendent
6401 Linda Vista Road, San Diego, CA 92111
- San Leandro Unified School District**
Contact: John Thompson (510) 667-3523
Assistant Superintendent of Human Resources
835 E. 14th Street, San Leandro, CA 94577
- Vista Unified School District**
Contact: BethAnn Arko (760) 631-4537
Director of Human Resources
1234 Arcadia Ave., Vista, CA 92084

The following is a partial listing of public school systems that Educational Management Solutions has provided services that, in part or in whole, included components of the study as proposed.

- | | | |
|---|--|---|
| Alameda City - California Anne Arundel - Maryland | Golden Valley - California Grand Island - Nebraska | Roseville City - California Roseville Joint - California |
| Atwater - California Battleground - Washington | Grandview - Washington | Roswell - New Mexico |
| Blue Valley - Kansas | Great Falls - Montana | Salina - Kansas |
| Carlsbad - California Carlsbad - New Mexico | Grossmont Union - California | San Diego City - California |
| Castro Valley - California | Hesperia - California | San Dieguito - California |
| Centenila Valley - California Clover - South Carolina | Hobbs - New Mexico | San Leandro - California |
| College of Marin - California Davenport - Iowa | Issaquah - Washington | San Lorenzo - California |
| Desert Sands - California | Lawrence - Kansas | Santa Clara COE - California |
| Dos Palos - California | Mariposa County - California | Sedro-Woolley - Washington |
| Dry Creek Elem. - California East Valley - Washington | Marysville - California | Sweetwater - California |
| Eureka - California | Mesa - Arizona | St. Louis Parish - Louisiana |
| Fairbanks - Alaska | Morongo - California | Tacoma - Washington |
| Floyd County - Georgia | National City - California | Tahoe-Truckee - California |
| Forest Grove - Oregon | New Britain - Connecticut | Tahoma - Washington |
| Fortuna - California | Oceanside - California | Tolleson - Arizona |
| Frederick - Maryland | Omak - Washington | Walker - Georgia |
| Gilbert Public - Arizona | Palo Verde - California | Wapato - Washington |
| Glendale Elem. - Arizona | Pendergast Elem. - Arizona | Warren - Michigan |
| | Placer COE - California | Washington Union - California |
| | Planada - California | West Fresno - California |
| | Pleasanton - California | West Valley - Washington |
| | Raymore-Peculiar - Missouri | Yakima - Washington |
| | Riverside COE - California | Yuma HSD - Arizona |

Projected Project Staff

Fred Corn (Project Team Support / Report Analysis) Fred has 16 years of experience in human resource management with specialization in employee benefits and compensation. Mr. Corn, in addition to his background in school district operations also has a degree in Computer Science and significant experience in programming and application of computer technologies for human resource operations. Mr. Corn is based out of the Central Regional Office in Kansas.

Sandra Dickerson (Job Analysis) Sandra has more than 30 years of experience as a teacher and school administrator. Ms. Dickerson was also recognized at the Most Distinguished Principal in the Kansas City Area by the Greater Kansas City Principal's Association. Ms. Dickerson currently serves as a student teacher supervisor for Graceland University. Ms. Dickerson works out of the Kansas City Metro area.

Beverly Goldie (Job Analysis) Beverly has over 20 years of experience in as a teacher and administrator in Elementary, Secondary and Adult Educations. In addition to her teaching credential in Elementary and Special Education, Dr. Goldie, has held the administrative positions of Principal, District Bilingual Education Coordinator, and Director of Instruction and Personnel. Prior to joining EMS Dr. Goldie directed the Workforce Development Education for San Joaquin County Office of Education. Ms. Goldie is based out of the Central Office of EMS in Murphys, California.

Betty Gray (Project Management/Data Analysis) Betty directs the Company's Project Operations. Ms. Gray has over 20 years experience in supervision, labor relations and employee training. Ms. Gray has extensive expertise in analyzing jobs for use in the development of pre-placement medical exams, compensation evaluations and personnel compliance. Ms. Gray will provide overall coordination of the project's team. Ms. Gray is based out of the Western Region Office in Oakland, California.

Larry Hunn (Data Analysis/Report Development) Larry has extensive experience in personnel management and workers compensation administration in both the public and private sectors. As a former educator and counselor, Mr. Hunn developed innovative approaches to assist students with special needs in transitioning from school to the workplace. Mr. Hunn is the founder of EMS and is based out of the Central Office in Murphys, California.

Randy Lamer (Project Management) Mr. Lamer has many years of experience working with educators, administrators, executives, and project teams to develop and effectively utilize a vast array of human resource management strategies. He has degrees in Human Resources and graduate degrees in Technical Teacher Education and Business Administration.

George Mathes (Job Analysis) George has 35 years of experience in education, including 15 years in human resources management. Mr. Mathes has been a teacher, principal and prior to joining EMS served as a director of human resources. In addition to his responsibilities with the company, Mr. Mathes serves as a regional coordinator for the North Central Association Commission on Accreditation and School Improvement. Mr. Mathes is based out of the Wyoming branch office.

Vida Santone (Job Analysis) Ms. Santone recently retired from Raytown Public Schools, Raytown Missouri where she most recently served as the Associate Superintendent of Human Resources. Ms. Santone currently serves as a student teacher supervisor for Graceland University. Ms. Santone works out of the Kansas City Metro area.

Matt Spencer (Job Analysis) Dr. Matt Spencer is a veteran education leader and human resource professional who served thirty-three years in public education in Missouri and California. During his twenty-six year career as an educational leader, he served in various roles including High School Principal, Director of Classified Personnel, Asst Superintendent for Human Resources, and Superintendent of Schools. Matt specializes in developing workplace bullying strategies and effective HR department structures. He works out of the Southern California area.

Scope of Work

Benefits of the EMS Approach

During the course of this Study EMS will provide the combination of training and consultation needed to maximize the benefits that can be gained by the District.

- **Nationally Recognized Leader in Educational System Human Resources Consulting:** Working with a consultant that is nationally known for successfully serving only educational systems throughout the United States ensures that the project will be done effectively and accurately.
- **Legally Compliant Function Based Job Descriptions:** A Study based upon the most current, legally compliant and defensible data collection and function based job description design processes provides the level of defensibility, legal compliance (ADA, FLSA, EEOC, etc.) and usability your school system requires.
- **Highest Level of Employee and Supervisor Buy-In:** Our unique “steering committee”, “focus group” and “supervisor validation” processes ensure the participation of all employees and supervisors that may be impacted by the Study’s recommendations and ensures buy-in of all parties to the study’s process and successful implementation. *then process or ours*
- **School Validated Point-Factor Based Internal Wage Equity:** Our proprietary Multi Point-Factor analysis process has been created and validated with assistance from client school systems. This process ensures an analysis with the high level of internal integrity across all job classifications that is critical for understanding the relationships between jobs and the development of compensation structure recommendations. *Point factor system*
- **Customized Local Market Study Results:** EMS provides customized market research processes that are based specifically on local (school and non-school) competitors which provides an accurate and up-to-date market salary analysis. This ensures that any final wage adjustment recommendations are based on competitiveness with the local market.
- **Competency Based Prerequisite Job Factors:** Documentation of the Knowledge, Skill, Ability, Responsibility and Working Conditions based competencies that are required to for employees to effectively perform the functions of each job classification assists in accurate hiring and addresses fair pay and prerequisite job factors.
- **Strategic Compensation Structure Planning:** Evaluation of current compensation structures and assistance in the development of *strategic* and *sustainable* compensation structures for all staff classifications as necessary to fully meet the needs, budget conditions and strategic direction of the school system. Further the development of implementation plans that provide direction in a timely and employee friendly manner will be completed.
- **HR Staff and Hiring Supervisor Training:** Throughout the study “steering committee” members, hiring supervisors and Human Resource staff will receive training on the processes used in the Study, the necessary legal requirements (ADA, FLSA, EEOC, etc) and will learn how to put completed job information to use in multiple ways. *maybe used*

- **Most Widely Used Job Description Software:** Our proprietary *JobsPlus*™ software (the exact same software EMS analysts utilize during the Study) will be licensed for use by District HR representatives. This software is the most widely used job description software used by school systems in the United States and will allow your Human Resource staff to efficiently maintain job information current and provide consistency in Human Resource decision-making for a wide variety of human resource functions.
- **Maximizing the Ongoing Usefulness of Data:** Our goal is to provide all of the information, tools and training necessary for your Human Resource staff to be able to maintain a uniform process for employee related decisions throughout District operations. While EMS staff members are always available to provide assistance, your Human Resource staff will be able to effectively and efficiently utilize, maintain and update job classifications and wage structures provided by the Study.

Description of Methodology

This is a Compensation Project of up to approximately 82 District job classifications as referenced on the information provided by Fountain Valley School District. The Project will incorporate “essential functions” based job analysis, application of an equity based point factor classification model specific to the field of education, internal validation and external validation of the current salaries, and specific recommendations.

This Project will be a collaborative effort between the Fountain Valley School District (District) and Educational Management Solutions (EMS). However, EMS will be responsible for the overall management of the Project, conducting the major processes and ensuring that the outcomes are achieved.

District Participation: The District will assign an individual to act in a coordinating role with EMS. The coordinating role of the District administrative staff will be primarily limited to scheduling Project activities that involve District personnel (e.g. meetings, incumbent focus groups, etc.) and distribution of EMS developed materials for employee feedback.

In addition, Fountain Valley School District will provide selected Human Resources staff members who will be trained in job “best practice” function-based description design and internal equity based strategic compensation planning.

Specific components of the Project will include:

Planning: This phase provides an opportunity to review and confirm the scope of the Project, identify critical activities, analyze the District’s current job descriptions and related practices, develop timelines, and assign specific responsibilities. This planning phase will reduce the Project’s duration and ensure efficient utilization of District resources. This phase includes:

Project Management - During this phase, EMS will meet with District representatives to confirm the classifications for analysis, Project process and timelines. Consideration will be given to the District’s desired level of defensibility, resources available, limitations of work setting/schedules and indirect cost factors. Once these factors have been reviewed, the sources

of information and the appropriate methods of data collection can be finalized. A Project Plan identifying key Project components, responsibilities and time frames of EMS and District personnel will be the output of this phase. The Plan will serve as a “road map” for the Project.

Job Analysis: The overriding philosophy of the Project is to develop reliable and defensible information upon which the Project’s recommendations are based. The heart of the Project is the job analysis process. This phase will determine the functions of a job and identify those essential functions in accordance with the Americans with Disabilities Act’s guidelines developed by the Equal Employment Opportunity Commission (EEOC). The process will organize, for each job classification, the essential and marginal job functions, the prerequisite requirements, and other related job information. This process will result in the development of up-to-date job descriptions for each classification and serve as the foundation of job information for the Project’s Job Valuation and Market Survey phases. **The process will ensure the opportunity for input of every employee currently performing in the studied job classifications.** This phase includes:

Orientation Meetings – Orientation meetings will be held for affected District staff, supervisors and administration. The purpose of these meetings will be to ensure that all interested parties understand the process that is about to take place and that they have appropriate input and access to the process. Supervisors will be given the opportunity to provide organizational information and specific information regarding the District’s current compensation structures and market competitiveness.

Focus Group Interviews - Each job classification will be analyzed through a combination of focus group and/or individual interviews of a sample of employees within each of the studied classifications. Participation of current employees performing the specific job functions has been held to be the most “defensible” process in the development of job information upon which compensation and future employment decisions are based. Employee involvement has the additional benefit of increasing “buy-in” to the final recommendations. The number of incumbents that participate in the Study will be based on a combination of District philosophy and available staff resources. It is estimated that up to 25 focus groups will be required to gather the required job information.

Validation of Data – Trained EMS representative(s) will meet with immediate supervisors and administrators to review and revise Drafts of collected job information data and to verify specific job specific competencies. EMS and District Human Resources staff will facilitate this process to ensure that the information is complete and accurate.

Job Description Drafts – Draft job descriptions for each studied classification will be developed following validation of the job content by supervisors. The draft job descriptions will contain job information that identifies the “essential” and “marginal” functions as defined by the Americans with Disabilities Act (ADA) and in conformance with the related guidelines of the Equal Employment Opportunities Commission (EEOC), ensure the functions are related to the purpose of the job, and address other related job information such as prerequisite job requirements of

skills, knowledge, abilities, etc. To expand the sample and provide the opportunity for “inclusion” of all employees in the job analysis process, these drafts will be distributed to every incumbent for review prior to development of the recommended job descriptions.

Why Doesn't EMS Use Position Information Questionnaires?

Best practice research indicates that requiring employees to complete position information questionnaires in an undirected manner is uncomfortable and generally not effective. This method of data collection is typically *only used in order to save cost, reduce study time and/or when high-quality analysts are not available*. In a 2014 survey performed by the Society of Human Resource Management (SHRM) in collaboration with and commissioned by ACT it was found that the leading method of conducting job analysis is Interviews (50%); followed by Observation (33%); and that Structured Questionnaires were utilized least often (27%). Additionally, in their college textbook *Human Resource Management – 9th Edition*, Robert L Mathis & John H Jackson identify some of the major disadvantages of this method as being that “the questionnaire method assumes that employees can accurately analyze and communicate information about their jobs. Employees may vary in their perceptions of the jobs, and even in their literacy.”

Our multi-staged data collection approach which includes 1) Focus Groups (Small group brainstorming interviews) followed by 2) supervisor validation meetings and then 3) distribution of draft job descriptions to all employees during our data collection and job analysis processes. This multi-layered structure maximizes both employee participation and accuracy of results. Small group interview (brainstorming) processes have been identified as “best practice” by industry experts. In a recent SHRM presentation Patricia A. Meglich, Ph.D., SPHR, stated that interviews generate “deep information” and “rich qualitative data”. The Congressional Management Foundation found that these small group – brain storming activities “make the process more enjoyable (and less avoidable) and usually will identify some relevant tasks that staff, working by themselves, may forget to include”. Finally, the authors of the textbook *Human Resource Management – 9th Edition* state that especially “For certain difficult-to-define jobs, group interviews are probably most appropriate”.

Over the past two decades, EMS has built upon the “best practice” industry standard practices to develop and perfect a process that is precisely suited for educational systems and allows all employees and supervisors guided opportunities to provide input in an effective and comfortable manner. In addition, this multi-step structure provides the checks and balances needed to ensure no relevant job information is missed and that the most accurate and actionable data possible is provided to our clients.

Compensation Structure Analysis: All current District compensation structures and guidelines will be collected and analyzed for strategic planning, format, consistency and overall comparability to the compensation structures of competing school and non-school market sources.

Job Valuation: This phase, also identified as *Internal Equity Analysis*, will include analyzing the job information gathered from the job analysis phase utilizing an education-based matrix of thirty four multi-level classification factors guided by “equal pay” principles. This will provide an analysis of the job’s prerequisite requirements in relation to the degree of Complexity, Skills, Knowledge, Abilities, Responsibility and Working Conditions associated with performing the job. The analysis will serve as the foundation for development of findings regarding the internal equity of the District’s current salary schedules. The phase will include:

Review of Internal Equity Point Factors - EMS will review with the Steering Committee the multi-point factor job evaluation system. The review provides the Committee with an understanding of internal equity principles of compensation.

Data Analysis - Each job's prerequisite requirements will be rated and a weighted value determined for each classification. Classifications will be ranked based on a job’s weighted value compared to its placement on the salary schedule. Preliminary recommendations regarding appropriate salary schedule placement will result from this internal equity analysis.

Findings - The data analysis will result in the development of findings with regard to the internal equity of the District’s salaries for the studied job classifications. These findings will provide a foundation for recommendations presented in the Study’s Final Report.

Why Does EMS Use Point-Factor Comparisons

Point Methods are the most widely used job evaluation method because they are more sophisticated and objective than other (ranking and classification) methods. Advantages of using this system of internal equity analysis include the fact that it reduces supervisor and/or interviewer subjectivity / bias and provides a more comprehensive view of each job classification studied. Finally, this method also evaluates the essential components of every job studied before current pay structure and market competitiveness are considered. This, again, ensures a multi-tiered strategy of 1) internal equity analysis; 2) comparison to current wage structures; and then 3) identifying levels of market competitiveness.

EMS has developed a very sophisticated yet easy to utilize, school specific point-factor analysis rubric consisting of 34 competencies. Over two decades, EMS has worked with client educational systems to identify and refine these competencies and to identify precise wording that is then used to delineate consistent criteria for developing the internal equity structure best suited for each of our client educational systems. These competencies are designed to identify the skills, knowledge, working conditions, levels of responsibility and abilities that an incumbent needs to possess to successfully complete the functions of each job classification. This process ensures consistency and the highest level of accuracy.

Market Survey: EMS will conduct an analysis of the compensation for comparable positions at Districts and other employers within the competitive marketplace. It is recommended that the market sample be uniform for all studied job classifications to reinforce the “fairness” of the process. In selecting sources to be surveyed, priority will be given to those within the geographic proximity to the District and/or of a similar size and scope. This phase will include:

Design – In consultation with District administration, EMS will confirm with the Steering Committee the organizations to be surveyed and the representative job classifications to serve as benchmarks. While specific numbers cannot be quantified at this time, based on past experience, it is anticipated that a combination of 11 educational systems and/or mutually identified public agencies and/or private sector employers will be surveyed. Approximately 35% of the current job classifications in each grouping will serve as benchmark classifications. The final numbers of market sources and benchmark classifications will be determined in consultation with the District.

Classification Data Collection – Compensation practices for the matching benchmark positions will be gathered through a combination of surveys and interviews with the appropriate personnel at each of the surveyed Districts. Benchmark jobs often have similar titles in surveyed organizations but not necessarily similar functions and/or prerequisite requirements. When this is the case, only data from jobs with similar functions and prerequisite requirements will be recorded.

Data Analysis – The market salaries and related compensation factors for the benchmark classifications will be analyzed. Selected benchmark classifications will be representative of the job classifications across the ranges of each of the salary schedules of the studied classifications. Other classifications will be slotted as to their relative position to the benchmark classifications within each schedule.

Classification Findings – The data analysis will result in the development of preliminary findings regarding the market competitiveness of the District’s salaries for the benchmark classifications. These findings will provide a foundation for recommendations presented in the Study’s Final Report.

Strategic Compensation System Design: A comprehensive analysis of current compensation structures, District goals and objectives and competing employer compensation structures will be completed. From this information, in conjunction with District leadership, EMS will develop recommended *strategic* and *sustainable* compensation structures for all studied job classifications. This strategic structure will provide the platform necessary to fully meet the needs, budget conditions and strategic direction of the school system. Further, the development of implementation plans that provide direction in a timely and employee friendly manner will be completed.

Report Development: A *Classification Study Report of Findings & Recommendations* will be produced that integrates all of the Study components with findings, conclusions, recommendations and implementation strategies. This phase includes:

Preliminary Findings - Preliminary findings of both the Internal Equity Analysis and External Market Analysis will be developed and reviewed with the Steering Committee and District Administration for input prior to development of the final report.

Final Report - The Study's *Report of Findings & Recommendations* will be submitted to the District for action. The Report will provide the following:

- Recommended Job Descriptions (*Job Classification Specifications*) that are in conformance with applicable laws, rules and regulations.
- Salary placement recommendations of specific classifications based on the integration of findings from the Job Valuation (internal equity) and Market Survey (external equity) analyses.
- Recommended benefit structures.
- Recommended salary administration and compensation practices.
- An appeals procedure to address reclassification requests over time.

Final Report Presentation – Following development of the Final Report, EMS will be available to make a single presentation of a summary of the Study's Findings and Recommendations if requested at no cost. Additional requested presentations will be provided with charges limited to out-of-pocket expenses.

Final Recommended Job Descriptions: Final recommended job descriptions will be provided for final approval and usage. Final job descriptions will contain job information that identifies the "essential" and "marginal" functions as defined by the Americans with Disabilities Act (ADA) and in conformance with the related guidelines of the Equal Employment Opportunities Commission (EEOC), ensure the functions are related to the purpose of the job, and address other related job information such as prerequisite job requirements of skills, knowledge, abilities, etc. In addition, job classifications that meet the exemptions will be identified in the Fair Labor Standards Act (FLSA) will be identified.

These job descriptions, in conjunction with *JobsPlus*[™], can be used in a wide variety of ways including: Recruiting, selection, hiring, employee appraisals, staffing analysis, wage planning, ADA accommodations, workers compensation, etc.

Software Application: The District will be licensed with the proprietary software *JobsPlus*[™] for use in the development and management of job information. The software will contain all of the job information gathered during the course of this Project and will allow the District to continuing maintaining a fair, equitable and defensible process in making job related decisions based on accurate job classification data. This phase would include:

Software Customization - Data will be provided in a software format which can be utilized for the development and updating of Job Descriptions, distributing Job Announcements, development of Performance Appraisals and Individual Work Improvement Plans, and analyze Reasonable Accommodation and/or Early Return-to-Work decisions.

Software Training - District personnel will receive “hands on” training. Training will focus on maintaining collected job information, generating new job descriptions, and utilizing each of the software features.

Software Installation - At the conclusion of training, the District will be provided the most current version of the software *JobsPlus™* in accordance with current licensing agreements.

License & Client Support - EMS will license the software for use by the District through 6/30/2016. The annual software license fee of \$695 will be waived through this period.

Why EMS Allows Clients to Use JobsPlus™?

Educational Management Solutions is committed to providing the *training and tools you need to maintain accurate job descriptions and classification placements after the completion of the study.*

In addition to the post-study reference materials provided by other consultants, EMS will license Fountain Valley School District to use our proprietary software *Jobs Plus™* at no additional cost.

Our exclusive *Jobs Plus™* software solution is the most utilized job description design and classification software solution used by school systems across the United States. With this software solution your HR staff will be able to follow a step-by-step process to maintain the accuracy and legal compliance of your job descriptions and related classifications as you walk through an organized ongoing reclassification process with employees and supervisors when functional job changes occur.



In addition, *JobsPlus™* provides reports and analysis for Job Postings, Hiring and Placement, Ongoing Wage equity, Workers Compensation, ADA Accommodation, and Employee Performance Evaluations. With *JobsPlus™*, EMS truly is your partner for effective, school-specific HR Solutions.

Project Integration: EMS and District Administration will work jointly to assure acceptance of the process as one that reflected “fairness”. Every effort will have been made to secure input from affected employees and administration prior to making recommendations. EMS personnel will be available for a 90-day period for phone and web-based consultation at no additional cost to assist the District in implementing the recommendations contained in the Project’s *Report of Findings & Recommendations*.

Project Timeline

Following are projected Project component completion dates. The key factor in maintaining this schedule will be the District's ability to coordinate and schedule resources. The following timeline assumes a start date of December 6, 2015

| <u>ACTIVITY</u> | <u>Approximate Project Timeline</u> |
|--|-------------------------------------|
| Planning | |
| <u>Study Management:</u> includes collaboration with District Administration to review scope of Study; identification of primary contacts; defining job classifications and role of steering committee; scheduling initial meeting of committee; scheduling focus groups; reviewing timelines, etc. | December, 2015 |
| <u>Steering Committee Development & Orientation:</u> includes review of Study activities, overview of processes, and identification of market sources. | January 2016 |
| Job Analysis | |
| <u>Begin Data Collection:</u> includes conducting focus group and individual interviews. Focus groups may be completed in two separate onsite visits based on District specifications. | January 2016 |
| <u>Complete Classification Data Collection:</u> completion of scheduled focus groups. Makeup sessions may be scheduled as appropriate during the course of the study. | January 2016 |
| <u>Validation of Classification Data:</u> includes development of draft job information collected for distribution to supervisory staff and focus group participants for review. | February 2016 |
| <u>Return of Classification Data:</u> includes return of draft job analyses for analysis and modification as appropriate. | April 2016 |
| <u>Final Job Descriptions:</u> includes development of draft job descriptions based on validation process for distribution to all incumbents. | May 2016 |
| Job Valuation | |
| <u>Review of Classification Instrument:</u> includes training on process and review of education-based job valuation weighting factors. | January 2016 |
| <u>Data Analysis:</u> includes job evaluation factor weighting and comparison to salary schedule(s). | February 2016 |
| <u>Application of Classification Instrument:</u> includes evaluation of all classifications. | March 2016 |

Market Survey

Design: includes training on process, identification of Districts and other public/private organizations to be surveyed, and selection of job classifications as benchmarks. January 2016

Begin Data Collection: includes combination of personal and phone interviews with identified survey sources and follow-up phone contact as may be required. February 2016

Complete Data Collection & Data Analysis: includes analysis of market data and identification of additional follow-up as may be required. March 2016

Report Development

Classification Recommendations: includes review of preliminary recommendations with District Administration and Steering Committee for input. April 2016

Final Report: includes description of all Study phases, final job descriptions, cost and non-cost recommendations, and implementation planning strategies. May 2016

Software Applications

Software Customization: includes loading software with Study's information. May 2016

Software Training & Update: includes installation and formal hands-on training of software. Scheduled at District's convenience

Client Support: initiated with software license that includes unlimited phone support through June 2016. Following software training

Notes:

- * *Completion of Study is dependent on the District's ability to schedule resources within the indicated time frames.*
- * *Time frames can be adjusted based on the District's requirements.*

Recommend Appeals Process

Educational Management Solutions and District Administration will work jointly to assure acceptance of the process as one that reflected “fairness”. Every reasonable effort will be made to secure input from employees and gain consensus on information upon which the recommendations are made. However, there are circumstances that can generate questions from specific employees and/or groups of employees. Employees should have an opportunity for a reasonable hearing for their questions. Throughout the appeals process, while responding to employees’ questions the following concepts/distinctions are important.

Job vs. Position - A specific employee’s job assignment may require performance of job functions different from the norm due to unique demands of a particular job setting, a supervisor’s expectations, an employee’s interest and desire and/or in situations of providing for growth. None of these situations necessarily would indicate that the employee has a “different job” or is “working out of class” but rather the employee is defining a *position description* versus a *job description*.

Function vs. Methods or Tasks - Typically jobs have been defined by a combination of functions, methods, tasks, requirements, etc. The defining of a job by its functions (essential and non-essential) is the most inclusive approach and has been found to be defensible when using as the basis for employment decisions. Job functions are most closely related to the overall purpose of a job with tasks serving as sub components or steps required to complete a function and methods relating to how the job is performed. Often employees may focus on how the job is done rather than that of the purpose of the job as defined by the job functions.

Changes in Functions - Due to organizational changes, environmental (site) conditions, different equipment and/or new technology, job functions may be added or deleted or job requirements change over time. This factor is a significant concern in updating all job descriptions is a significant component of the Classification Project.

Incomplete Data - During the processes of updating job information there may be instances where the job information collected is incomplete. While every effort is made to keep this situation from occurring it is conceivable that the sample of incumbents that participated in the Project was not representative of the job class as a whole. The validation process provides employees an opportunity to review the focus group data, supervisor’s review and committee review should have eliminated this concern.

The appeal process for the Classification Project and that used for periodic requests for reclassification should be essentially the same. The following suggested guidelines apply equally to both processes:

Timing - It is recommended that a specific timeframe (i.e. 30 days annually) be established for appeals or requests for reclassification. This condenses the administrative efforts, allowing the least disruptions to workloads, focuses the effort of all parties to reach sound decisions and is least disruptive to morale.

Written Documentation - A Job Classification Review Form developed setting out specific procedures incorporating the following:

- Procedures for submission
- Procedures for review and disposition
- Basis of request by employee

Basis of Request - Terminology and definitions should be consistent and understood by all parties, i.e. essential functions, task/method, requirements, etc. The basis of the request should be guided by factual information on how the job differs from that described. Valid basis for review should be focused on the following:

- Essential Functions performed have changed and are at variance with Job Description
- Job Requirements have changed and are at variance with Job Description
- Standards of Performance have changed requiring difference skills, knowledge and abilities
- Initial decisions were based on inaccurate information

Classification Review Committee - The District may wish to develop an appeals committee. Such a committee, with the process and authority (fact finding and advisory) clearly defined, can provide both valid input and objectivity to the eventual decision.

Decision Making Process: The process may vary based on the stated justification for the request, however, assuming that the initial job data is current, the normal review should focus only the following three areas:

- Evaluation of Published Job Functions. Analysis should ensure that employee's justification statement of new and/or additional functions is not a semantic restatement of a function, a listing of tasks and/or the usual and customary methods of performing the function.
- Review of the Pre-requisite Job Requirements. Due to organizational changes, new equipment, and/or new technology employees may perceive that the job has changed to an extent justifying re-classification. In today's labor market it is not unusual for 50% of the skills and knowledge required for a job to be out of date within 3 years. This is a common trend across all industries and new requirements placed on an employee to maintain performance should not alone be the factor guiding re-classification. Measures can be used to determine how changes over time have impacted the skills, knowledge, abilities, responsibilities and working conditions necessary to perform the jobs' functions. For each job classification over 30 factors were evaluated as part of this Project and review of these factors can provide a level of objectivity for all parties. It is also necessary to determine if changes in job requirements indicate a trend that has impacted all positions or only a few.

- Impact on Internal Relationships. An understanding of how a potential recommendation impacts other positions, the overall salary schedule structure and finances is equally important. Condensing the time period for review can assist in putting the recommendations into perspective in relationship to the overall personnel and financial impact.

Ongoing Maintenance of Job Classifications

The final goal of Educational Management Solutions will be to equip your District with the information, training and tools needed to maintain the accuracy of the job description design and compensation structuring provided by the Project itself.

Upon the completion of the classification Project, Educational Management Solutions will provide comprehensive, customized training to your Human Resources staff. Further, we will work with your HR staff and employee groups to design an ongoing reclassification process that will meet the needs your District and complies with Commission guidelines.

Through the use of this training, our detailed instruction manual and (most importantly) our exclusive *Jobs PlusTM* job description design and classification software solution, your HR staff will have all of the tools you need to easily and accurately maintain your job descriptions and related classifications.

Our exclusive *Jobs PlusTM* software solution is the most utilized job description design and classification software solution used by school systems across the United States. With this software solution your HR staff will be able to follow a step-by-step process to maintain the accuracy and legal compliance of your job descriptions and related classifications as you walk through an organized ongoing reclassification process with employees and supervisors when functional job changes occur.

Project Cost and Method of Payment

EMS has analyzed the District's objectives and the following references the Study's phased components as described in the body of the referenced proposal. Also identified are the deliverables of each phase for purposes of monitoring and invoicing. **The total cost for completion of all listed job classifications within a single year is \$48,995 including all travel, printing and related expenses.**

NOTE: Pricing break-outs are listed on the next page in case district decides to divide the study into multiple yearly segments (or not perform the study on one or more categories of listed job classifications)

Planning – Plan Development: **Payment: 20%**

The deliverable will be a finalized project schedule detailing activities, targeted completion dates and responsibilities.

Job Analysis – All Classifications: **Payment: 30%**

The deliverable will be completion of the scheduled data collection / focus groups.

Job Analysis - Validation of Data: **Payment: 20%**

The deliverable will be submission of initial drafts of the collected data for validation by supervisors, steering committee members and/or administration.

Market Survey: **Payment: 15%**

The deliverable will be completion of the Market Survey and Analysis for review with District administration.

Findings & Recommendations: **Payment: 10%**

The deliverable will include review of preliminary findings and strategic compensation structure development with District Administration and Steering Committee for additional input.

Report Development – Final Report: **Payment: 5%**

The deliverable will be completion of the Study with the *Compensation Study: Report of Findings & Recommendations*.

Software Applications: Software/Training/Installation: no additional cost

The deliverable will be the software referenced in the *Description of Methodology - Software Applications* section of this proposal. Support will be provided as described until June of 2016 following installation with the annual license support fee of \$695 waived during this period.

Project Integration: **limited to out-of-pocket expenses**

EMS personnel will be available during a 90-day period immediately following submission of the Study's *Report of Findings & Recommendations* for consultation with regard to utilization of developed job information and implementation of the recommendations. Charges to the District will be limited to out-of-pocket expenses for requested on-site activities during this period. An exception will be for the initial presentation, if requested, of the Study's Findings and Recommendations that will be provided at no charge. Services provided related to the Study beyond this 90-day period for requested onsite services will be charged at a rate of \$750 per consultant per day plus expenses.

ANNOTATED SAMPLE

JOB DESCRIPTION Anytown School District

Bus Driver

Purpose Statement

The job of Bus Driver is done for the purpose/s of transporting students over scheduled routes and/or to/from special excursions; ensure safety of students during transport, load responsibilities for the inspection and light maintenance of assigned bus.

Purpose Statement provides a general description of the job. The statement needs to incorporate the purposes of the function statements.

Essential Functions

- Assesses incidents, complaints, accidents and/or potential emergency situations (e.g. road hazards, medical emergencies, accidents, etc.) for the purpose of resolving and/or recommending a resolution to the situation.
- Assists students and other passengers from buses including both e
- Attends various meetings, (e.g. classroom and behind the wheel training, safety meetings, inservice, administrative conferences, etc.) for the purpose of maintaining skills and meeting the certificate requirement/s of a school bus driver.
- Cleans assigned vehicles, both interior and exterior for the purpose of ensuring safety, appearance, and sanitation of vehicle.
- Conducts emergency evacuation drills for the purpose of ensuring efficiency of procedures and complying with mandated requirements.
- Drives school buses for the purpose of transporting passengers over scheduled routes to and from school and/or field trips in a safe and timely manner.
- Fuels assigned vehicle (e.g. oil, water, fuel, etc.) for the purpose of maintaining vehicle in a safe and operating condition.
- Monitors students and other passengers during transit including advising of appropriate behavior for the purpose of reinforcing established regulations and maintaining passenger safety.
- Performs pre-trip and post-trip inspections (e.g. fluid levels, tire pressure, exterior condition, mirrors, etc.) for the purpose of ensuring the safe operating condition of the vehicle and complying with mandated guidelines.
- Prepares documents and reports (e.g. monthly manifest, incident/accident reports, inspections records, passenger misconduct, mileage logs, student counts, route description updates, maintenance orders, driver's log, etc.) for the purpose of providing written support and/or conveying required information.
- Reports observations and/or incidents (e.g. discipline, inappropriate social behavior, etc.) for the purpose of communicating information to appropriate personnel.
- Responds to inquiries (e.g. students, parents, other school personnel, etc.) for the purpose of providing information and/or direction.
- Secures students requiring special accommodations (e.g. car seats, wheelchairs, restraints, etc.) for the purpose of ensuring their safety during transport.

Functions are identified as either *essential* or *marginal* as defined in accordance with the Americans with Disabilities Act (ADA). Function statements include a *purpose* as required by the Act. Function Statements are in alphabetical order so as not to assume a level of frequency or importance.

ling

Other Functions

- Assists other personnel as may be required for the purpose of contributing to the efficiency and effectiveness of the work unit.

A job's *marginal* functions as defined in ADA guidelines are referenced as "*Other*" in the job description so as not to reflect that they are of a lesser value in relation to an employee's job performance.

Classification & Compensation Study

Final Report Format – Sample Table of Contents

(With explanations: Noted in Blue)

Chapter 1 – Executive Summary

This section of the report provides an *Executive Summary* of the Classification Study's process, findings and recommendations. This section is frequently used to provide an overview of the project to Board and/or Commission Members. Chapter topics include a re-statement of objectives, a summary of the processes used to conduct the Study, an overview of the findings and recommendations, and summary of the implementation strategies. Topic headings typically include:

- **Objectives**
- **Processes**
 - Project Planning
 - Compensation Structure Analysis
 - Job Analysis
 - Job Evaluation
 - Market Survey
- **Findings**
 - Salary Schedule(s)
 - Internal Equity
 - Market Competitiveness
- **Recommendations**
 - Salary Schedule and Administrative Practices
 - Job Titles
 - Job Classification Schedule Placement
- **Implementation Strategies**

Chapter 2 – Study Process

This section provides a detailed overview of the processes used to conduct the study. The focus is on providing an understanding of the completeness of the process and the inclusion of all stakeholders in the process. Specific topics addressed include the background and/or factors that lead to the District's decision to conduct the study, the phases of the Study (Planning; Job Analysis; Data Collection; Data Validation; Internal Equity; and Market Survey processes). Included in this section is a detailed overview of the factors that were considered in the development of Findings and Recommendations. Topic headings typically include:

- **Background**
- **Approach**
- **Project Phases**
 - Planning
 - Job Analysis
 - Data Collection
 - Validation of Data
 - Job Evaluation
 - Market Surveys
- **Data Analysis & Implementation**

Chapter 3 – Findings & Recommendations

This section provides a detailed description of the Study’s specific Findings and Recommendations. Topics (while dependent on specific findings) typically include:

- **Findings**
 - Current Salary Structure
 - Job Valuation (Internal Equity Analysis)
 - Salary Levels Discrepancies of specific classifications based on Internal Equity Analysis
 - Market Analysis (External Equity Analysis)
 - Competitiveness of District’s Salaries in relation to Market Median
- **Recommendations**
 - Salary Schedule Modifications
 - Titles of Job Classifications
 - Salary Schedule Placement
 - Placement on Schedule

Chapter 4 – Implementation Planning

This section provides a review appropriate implementation strategies based on the developed recommendations that address both those with no financial impact and those that have a financial impact. Topic headings typically include:

- **Implementation Priorities**
 - Adoption of Job Descriptions
 - Changes to Job Titles
 - Consolidation of Job Classifications
 - New Job Classifications
 - Schedule Placement based on Internal Equity
 - Schedule Placement based on Market Competitiveness
- **Appeal Process Compensation**
- **Maintenance of Job Information and Compensation Structure**

Chapter 5 – Exhibits

This section provides definitions and information regarding the Study as well as detailed analysis that support the Study’s Findings and Recommendations. Specific exhibits include:

- **Glossary**
 - A Glossary – Terms
 - B Glossary - Reports
- **Definitions**
 - A Steering Committee - *list of members.*
 - B Focus Group Schedule – *schedule and list of participants in focus groups.*
 - C Data Collection Forms - *samples of questionnaires and other data gathering forms.*
 - D Job Valuation Factors – *description of Internal Equity Rating Criteria of 34 factors.*
 - E Market Survey Organizations – *listing of Education & Non-Education surveyed employers.*
 - F Benchmark Positions – *list of classifications that served as benchmarks for market survey.*

- **Data Analysis** - *dependent on scope of the study this section is typically duplicated for the different groups of classifications (i.e. classified, certified, management, confidential, supervisory, etc.)*
 - A Analysis – Current Classified Salary Schedule
 - B Recommended Title Changes
 - C Internal Equity Analysis with Charts
 - D External Market Survey -
 - D₁ Average and Medians - Summary
 - D₂ Average and Medians – All Sources with Charts
 - D₃ Average and Medians – Detail of Sources
 - D₄ Ranking Within Market Survey Sources
 - D₅ Benefit Analysis – *comparison of District's to Market Sources.*
 - E Benefit Analysis – *comparison of District's to Market Sources.*
 - F Adjusted Market Survey – *External Market Analysis Adjusted for Recommendations.*
 - F₁ Average and Medians - All Sources with Charts
 - F₂ Detail of All Reported Data
 - F₃ Ranking Within Market Survey Sources
- **Recommendations** – *a summary of the recommendations listing each studied job title, salary range, recommended title, recommended salary range and rationale for each recommendations.*
- **Administrative Practices** – *Dependent on the Findings specific practices may be recommended to provide the District with guidance in maintaining their job information and salary equity over time.*
 - A Appeal/Reclassification Process
 - A₁ Process Description
 - A₂ Appeal Worksheets
 - B Reclassification Process
 - B₁ Process Description
 - B₂ Reclassification Worksheets
 - C Software Applications
 - C₁ Job Description Development
 - C₂ System Reports

Educational Management Solutions

**Helping Schools Navigate
the Ever Changing World
of Human Resources**



CUSTOMER FEEDBACK:

"EMS knows school HR. All the products are developed with school districts in mind. They not only sell their product and train for its use, but most important, they provide support."

"We have been very impressed with the effective philosophy of EMS."

- ✓ Exclusively assisting school systems across North America
- ✓ Using comprehensive, efficient, time-tested strategies
- ✓ Providing easy-to-use, analytical, effective tools
- ✓ Applying client-centered processes to understand your needs
- ✓ Creating personalized solutions designed specifically for you



Educational Management Solutions

Your Partner for HR Solutions

Educational Management Solutions

Helping Schools Navigate the World of Human Resources

EMS Provides a Unique Combination of School Experience and HR Expertise

From our client-centered planning sessions and communication processes to our outstanding research, assessment, training and client support teams, EMS provides a level of support that is unmatched!

Service Solutions: Client-Centered and School Focused

- Job description development
- Classification studies
- HR department audits
- Benefits and risk management reviews
- Custom HR training and support

Software Solutions: Comprehensive and Easy-To-Use

- Online substitute acquisition
- Personnel records management
- Online applicant tracking and selection
- Employee benefit enrollment
- Professional development administration
- Job description / job description development

Commitment

- Comprehensive planning
- Cost effective solutions
- Ongoing support



Service solutions
to meet
your needs



Software solutions
designed for
school systems



Unmatched
customer service
and support

*EMS Is Your Partner For Effective HR Solutions
Let Us Help You Find The Answers You Need Today!*

Classification Study

Open The Door to Fair, Effective Job Description & Compensation System Design



CUSTOMER FEEDBACK:

"We are extremely satisfied with the classification study process that EMS has led us through and the positive impact it's having on our district"

"The finest classification system possible. They provide the tools to develop expertise within your organization to update and expand your system."

- ✓ Comprehensive processes designed specifically for schools
- ✓ Data collection using actual employee and supervisor input
- ✓ Accurate, consistent function based job description design
- ✓ Detailed, legally compliant internal equity analysis
- ✓ Compensation system analysis based on local market sources
- ✓ Effective, efficient and defensible implementation strategies
- ✓ Software and strategies to assist HR in maintaining job integrity
- ✓ Client-centered approaches that provide effective HR solutions



Educational Management Solutions

Your Partner for HR Solutions

Classification Study

Effective Job Description & Compensation System Design

EMS Provides Unmatched School Focused Classification Study Results

Comprehensive, valid job information should be the foundation for a myriad of HR decisions. Unfortunately, many school HR administrators do not have the staff, time and/or expertise to obtain this essential information.

Let EMS help you build effective, legally compliant job descriptions and fair, competitive compensation structures.

Effective Data Collection

- Employee input gained through focus groups
- Comprehensive supervisor validation processes
- Market information gained from local sources
- Extensive employee buy in achieved

Comprehensive Data Analysis

- Function based legally compliant job descriptions
- Defensible and understandable internal equity evaluation
- Valid salary schedule analysis and recommendations

Realistic Implementation Strategies

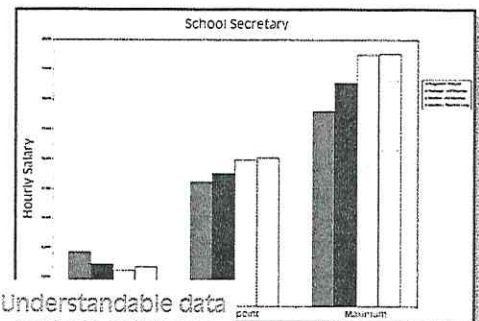
- Comprehensive, understandable charts and reports
- Realistic short and long-term strategic planning
- Understandable cabinet and board presentations

Post Study Software and Strategies

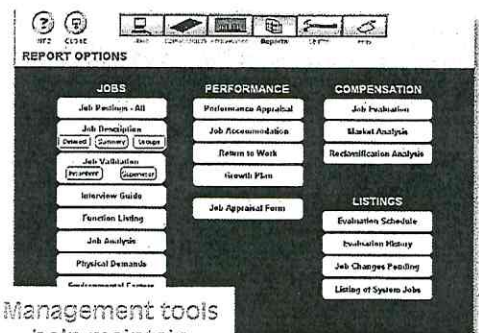
- Employee appeals processes for improved validity
- Jobs Plus™ job description software and training
- Ongoing job reclassification processes and strategies



Focus groups provide valid data & employee buy in



Understandable data analysis enhances defensibility



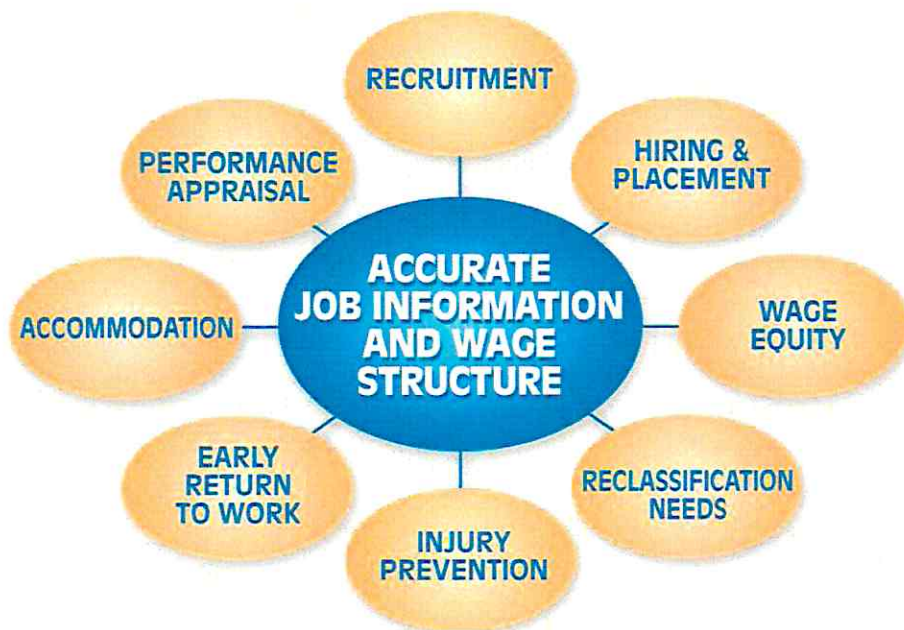
Management tools help maintain consistency

EMS Is Your Partner For Effective HR Solutions

Let Us Help You Find The Answers You Need Today!



Unleash the Power of Your HR Department with Effective, Accurate, Defensible Job Descriptions



CUSTOMER FEEDBACK:

"A terrific value. It is now easy for us to develop job descriptions, keep them current, ensure they meet the ADA requirements and make FLSA determinations."

"We gained the ability to develop defensible and comprehensive job descriptions quickly. The multiple uses of JobsPlus and the support of the staff at EMS have made a difference."

Using JobsPlus™ you can:

- ✓ Quickly create effective function and competency based job descriptions
- ✓ Utilize an electronic library of 300+ editable school-validated job descriptions
- ✓ Ensure ADA and FLSA compliant job description structure
- ✓ Evaluate internal job equity using school tested Point-Factor analysis tools
- ✓ Document required skills, knowledge, abilities, responsibilities, clearances, etc.
- ✓ Print and use function based job performance appraisal forms with ease

Silver, Gold and Platinum Editions Are Designed For School Systems of All Sizes
To Order Call Us at (209) 728-2187 or Order Online at emsaccess.com/jobsplus



Educational Management Solutions

Your Partner for HR Solutions

JobsPlus™

Unleash the Power of Effective Description Design

Design and Use Up-to-date, ADA & FLSA Compliant Job Descriptions With Ease

Using our easy step-by-step process you will be able to develop and maintain the comprehensive job descriptions you need to address the HR issues you face each day.

Comprehensive, Valid & Defensible Job Description Design

- Create defensible function based job descriptions
- Evaluate functions using the ADA as a guide
- Easily analyze prerequisite skills, knowledge, abilities and working conditions needed
- Choose from 300+ editable, school-validated sample job descriptions
- Describe the competencies required to perform job functions appropriately

Job Information for Multiple Uses

- Effective recruitment and hiring
- Employee performance evaluations
- Job reclassification request evaluations
- Internal equity and compensation system analysis
- ADA accommodations for disabled employees
- Injury Prevention and "Return-to-Work" issues

Documents & Reports Designed To Meet Your Needs

- Job postings and interview guides
- Employee performance appraisal forms
- Reclassification request worksheets
- Internal equity ranking analysis
- "Return-To-Work" reports



Select Desired Process

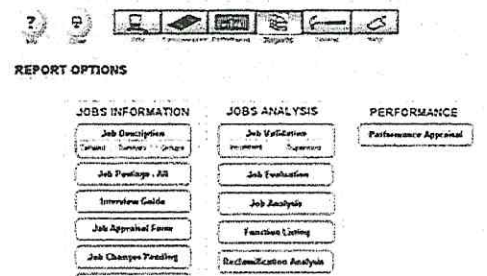
Anytown School District

EMS Software provides for a comprehensive approach to the development of job information. The software is designed to provide a standardized method of collecting and analyzing job related information which can then be utilized to address a wide variety of employment issues. Some uses include recruitment & hiring, performance evaluation and classification studies and

Information is available for multiple uses



Easily design effective job descriptions



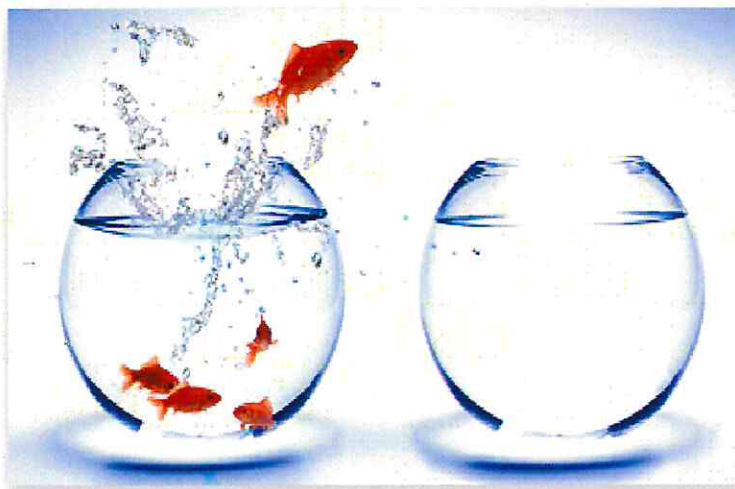
A wide variety of reports are available

EMS Is Your Partner For Effective HR Solutions

Order Online at emsaccess.com/jobsplus or Call Us Today!

Performance Appraisals Plus™

Reaching New Heights of Employee Performance and Organizational Success



CUSTOMER FEEDBACK:

EMS knows school HR. Their products are developed with school districts in mind. They not only sell their product and train for its use, but most important, they provide support."

"We have been very impressed with the philosophy of EMS."

- ✓ Utilizes "best practice" appraisal processes to encourage accuracy and consistency
- ✓ Aligns appraisals with job functions, required competencies and school system goals
- ✓ Manages workflow processes and provides effective, easy-to-use analytics
- ✓ Reduces the time and resources needed to manage performance appraisals
- ✓ Gives employees a clear understanding of work goals and performance results
- ✓ Personalized internet based employee, supervisor and HR portals ensure ease-of-use
- ✓ Increases opportunities for supervisor and employee communication
- ✓ Fully customizable with an ODBC structure that allows for data integration



Educational Management Solutions

Your Partner for HR Solutions

Performance Appraisals Plus™

Take Control of Employee Performance Appraisal Process

Employees, supervisors, directors and HR administrators can all save time and increase effectiveness through their own easy-to-use, personalized web-based portal.

Employee Understanding & Ease-of-Use

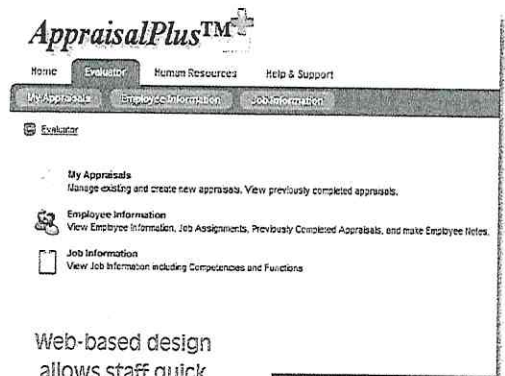
- View Work Assignments
- Document Mid-Year Work Performance Notes
- Perform Work Performance Self Assessments
- View Completed Performance Appraisals
- Receive Communications from Human Resources

Supervisor Accuracy & Consistency

- View Employee Information, History and Notes
- Document Mid-Year Work Performance Notes
- View Appraisals Due and Appraisal Work Flow
- Perform Employee Performance Appraisals
- Review and Analyze Employee Performance Results

HR Department Management & Control

- Quick and Easy to Use For Employees, Supervisors and HR
- Automated Web-Based Access Reduces Time and Effort
- Tools to Enhance Appraisal Accuracy, Consistency and Legal Compliance
- Customizable Appraisal Content and Work Flow Processes
- Appraisals Can Be Aligned with Job Functions, Competencies and/or Goals
- Tools That Improve Communication and Employee Performance
- Employee and Supervisor Analytical Tools and Reports
- ODBC structure allows for integration with existing systems



AppraisalPlus™

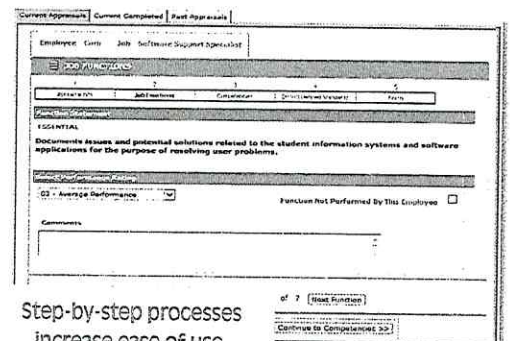
Home | **Evaluator** | Human Resources | Help & Support

My Appraisals | Employee Information | Job Information

Evaluator

- My Appraisals
Manage existing and create new appraisals. View previously completed appraisals.
- Employee Information
View Employee Information, Job Assignments, Previously Completed Appraisals, and make Employee Notes.
- Job Information
View Job Information including Competencies and Functions.

Web-based design allows staff quick easy access to data



Current Appraisals | Current Completed | Past Appraisals

Employee: Job: Software Support: Appraisal:

Job Functions

| Job Function | Competency | Essential Functions | Performance |
|--------------|------------|---------------------|-------------|
| | | | |

ESSENTIAL

Document issues and potential solutions related to the student information systems and software applications for the purpose of resolving user problems.

Comments

of 7 (Next Function)

Continue to Competency: 32

Step-by-step processes increase ease of use, accuracy & consistency



Increase communication, enhance productivity & improve employee morale

*EMS Is Your Partner For Effective HR Solutions
Let Us Help You Find The Answers You Need Today!*

FOUNTAIN VALLEY SCHOOL DISTRICT

PERSONNEL DIVISION

MEMORANDUM

TO: Personnel Commission

FROM: Ross M. Hessler, Director, Human Resources

SUBJECT: **ELIGIBILITY LISTS**

DATE: January 18, 2017

Attached are the eligibility lists for:

Office Assistant

Custodian

Head Custodian

Senior Payroll Technician

ELIGIBILITY LIST
Office Assistant
Expires 12-14-17

| RANK | NAME |
|-------------|--------------------------------|
| 1 | Wendy Adams |
| 2 | Lisa-Anne Angebrandt |
| 3 | Pamela Holmes |
| 3 | Deanna Hansel |
| 3 | Geraldine Donato |
| 3 | Cristie Collins |
| 3 | Elizabeth Villa |
| 4 | Yumi Tsurimoto |
| 4 | Cathy Calvert |
| 4 | Amber Burza |
| 4 | Tracee Mueller |
| 4 | Stephanie Rivas |
| 4 | Rabiathulbasaria Mohamedismail |
| 5 | Melinda Babbitt |
| 6 | Carolyn Galloway |
| 6 | Susan Oweiss |
| 6 | Kirsten Nocetti |
| 6 | Laura Calnon |
| 7 | Kris Scott |
| 8 | Valerie Crater |
| 9 | Abdul Batla |

ELIGIBILITY LIST
Custodian
Expires 12-19-17

| RANK | NAME |
|-------------|--------------------|
| 1 | Damien Dennis |
| 2 | Luis Merced |
| 3 | Joe Marshall |
| 4 | Chris Ruscheinsky |
| 5 | Jerome Akiona |
| 5 | Frank Jean |
| 6 | Juan Cuevas |
| 7 | Steven Erickson |
| 7 | Christopher Kintop |
| 7 | Alexther Gallardo |
| 8 | Patricia Hicks |
| 9 | Marco Cruz |

ELIGIBILITY LIST
Head Custodian
Expires 12-19-17

| RANK | NAME |
|-------------|-------------------|
| 1 | Chris Tomczak |
| 2 | Daniel Clavel |
| 3 | Frank Jean |
| 3 | Christopher Jones |
| 4 | Marco Chavez |
| 4 | Pablo Espinoza |
| 4 | Alex Laurean |
| 5 | James Nguyen |
| 5 | Eric Raposo |
| 6 | Tracy Scott |
| 6 | Nelson Aviles |
| 7 | Rich Perrier |
| 8 | Ernest Cortez |
| 9 | Patricia Hicks |

ELIGIBILITY LIST
Senior Payroll Technician
Expires 01-10-17

| RANK | NAME |
|-------------|-------------------------|
| 1 | Kathy Baran |
| 2 | Joshua McDevitt |
| 3 | Nayeli Parra Barrientos |
| 4 | Hannah Yoon |
| 5 | Terri Graham |
| 6 | Mathias Azzoni |
| 7 | Amy Ching |
| 7 | Nerissa Tse |
| 8 | Cynthia Garland |

FOUNTAIN VALLEY SCHOOL DISTRICT

PERSONNEL DIVISION

MEMORANDUM

TO: Personnel Commission

FROM: Ross M. Hessler, Director, Human Resources

SUBJECT: **JOB ANNOUNCEMENTS**

DATE: January 18, 2017

Job announcements posted since the last regular meeting of the Personnel Commission are attached as an information item:

Interdepartmental Transfers:

Extended School Program Aide

Head Custodian



Fountain Valley School District

Personnel Commission

10055 Slater Avenue, Fountain Valley, CA 92708 (714) 843-3228 www.fvsd.us

CLASSIFIED EMPLOYMENT OPPORTUNITY

Extended School Program Aide

Interdepartmental Transfer

The following position is posted in accordance with Personnel Commission rules and will be filled by “ready and willing” transfer eligibles or from the current list of “ready and willing” certified eligibles.

| | |
|----------------------|---|
| POSTING DATE: | December 15, 2016 |
| CLOSING DATE: | January 6, 2017 at 4:00 p.m. |
| SALARY: | \$15.18 - \$18.45/hr (Range 13, 5 Steps) |
| HOURS: | 15.25 hours/week MTWF, 2:00 – 4:45 p.m., Thursday – 12:30 – 4: 45 p.m. |
| TERM: | 9.55 months a year |
| VACANCIES: | Oka Extended School Program |

THE JOB

Under the direction of the Director-Child Care Program, this position helps provide a quality program and a safe and loving environment for children in the Extended School Program, assists with planning and implementing a variety of activities to meet the needs and interests of the children, and participates in activities with groups of children.

APPLICATION PROCESS

Present employees in the position of Extended School Program Aide wanting to transfer must send or email a note to the Personnel Department at johnsond@fvsd.us asking to be considered for a position. The communication must contain information sufficient to indicate the employee is a “ready and willing” transfer eligible. **The Personnel Department must receive all employee requests by 4:00 p.m., January 6, 2017. POSTMARKS WILL NOT BE ACCEPTED.**

| |
|--|
| <p>The Fountain Valley School District is an Equal Opportunity Employer and does not discriminate on the basis of race, national origin, gender, age, marital status, religion, or disability in compliance with federal and state laws.</p> |
|--|

No portion of this announcement is an express or implied contract with applicants. The Personnel Commission reserves the right to cancel, change, or rescind any portion of this announcement at any time.

Regular employees assigned four or more hours per day will become members of the Public Employees Retirement System. All regular classified employees will become members of California School Employees Association or pay a service fee.



Fountain Valley School District

Personnel Commission

10055 Slater Avenue, Fountain Valley, CA 92708 (714) 843-3228 www.fvds.k12.ca.us

CLASSIFIED EMPLOYMENT OPPORTUNITY

Head Custodian

Interdepartmental

The following position is posted in accordance with the Personnel Commission rules and will be filled by "ready and willing" transfer eligibles or from the current list of "ready and willing" certified eligibles.

| | |
|----------------------|---|
| POSTING DATE: | December 16, 2016 |
| CLOSING DATE: | December 29, 2016, 4:00 p.m. |
| SALARY: | \$3,882 - \$4,917 per month (Range 52, 5 Steps) |
| HOURS: | 40 hours/week |
| TERM: | 12 months |
| VACANCY: | Oka School |

THE JOB

Under the direction of the Principal, or Custodial Supervisor or department manager during school breaks, perform responsible custodial activities at a District school site or facility to maintain buildings and adjacent grounds areas in a clean, orderly and secure condition.

APPLICATION PROCESS

Present employees wanting to transfer must send or e-mail a note to the Personnel Office (johnsond@fvds.us) requesting to be considered. The communication must contain information sufficient to indicate the employee is a "ready and willing" transfer eligible. The Personnel Office must receive all employee requests by 4:00 p.m., Thursday, December 29, 2016.

APPOINTMENT/CERTIFICATION

Final selection of appointees will be made from "ready and willing" transfer eligibles and the top three ranks of "ready and willing" certified eligibles.

The Fountain Valley School District is an Equal Opportunity Employer and does not discriminate on the basis of race, national origin, gender, age, marital status, religion, or disability in compliance with federal and state laws.

No portion of this announcement is an express or implied contract with applicants. The Personnel Commission reserves the right to cancel, change, or rescind any portion of this announcement at any time.

Regular employees assigned four or more hours per day will become members of the Public Employees Retirement System. All regular classified employees will become members of California School Employees Association or pay a service fee.