



San Diego Unified

SCHOOL DISTRICT

To: All Site ^{DS} Administrators, ^{DS} Managers, and Classified OTBS Staff ^{DS} ^{DS}

From: Labor Relations, Human Resources, and the CSEA OTBS Bargaining Unit

Date: October 16, 2023

Re: **Classified OTBS Staff Workload**

The San Diego Unified School District recognizes and values the hard work and dedication of our classified staff, who serve an important role in connecting every child to their school. In order to support this work, we encourage principals and managers to assess and evaluate the workload of their classified support staff, discuss prioritization, and communicate expectations on a yearly basis.

Contractual Obligations/Considerations

Pursuant to the Office-Technical Business Services (OTBS) Collective Bargaining Agreement, Article 16.2, the following should be discussed with your existing and newly assigned OTBS staff early in the work year:

- **Job responsibilities.** Review the duties of the job classification and the specific duties assigned to the employee. Ensure assigned duties are consistent with those permitted within the job classification/position description document.
- **Prioritization of duties.** Provide the employee with information and direction about how to prioritize duties and responsibilities, and who to contact with questions about competing priorities and deadlines.
- **Expectations.** Discuss expectations for satisfactory performance and timelines for completion of work (when necessary).
- **Training.** Along with discussing duties, responsibilities, and expectations, solicit input from the employee regarding training needed to successfully meet the expectations and satisfactorily perform the duties of the position. Offer to provide the time/opportunity and encourage staff to attend training.
 - **General Trainings.** Please visit the following links for a listing of available professional development and training opportunities for DWA applications, such as PowerSchool, PeopleSoft HCM, and PeopleSoft Financial, and PeopleSoft job aids:
 - <https://sandiegounified.truenorthlogic.com/U/P/Tab/Home>
 - https://itd.sandiegounified.org/it_resources/people_soft
 - **Pupil Accounting (Enrollment/Absence Reporting and Verification).** For Pupil Accounting training resources related to enrollment procedures, absence verification and reporting processes please visit the following links (via the Staff Portal). For additional training resources and onsite training opportunities, please contact the Pupil Accounting Office.
 - https://staff.sandiegounified.org/departments/pupil_accounting/forms_and_procedures
 - https://staff.sandiegounified.org/departments/pupil_accounting/frequently_asked_questions



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- **Payroll and Timekeeping.** Please visit the following link (via the Staff Portal) for timekeeping Payroll resources. The resources contained here provide information and guidance on the roles and responsibilities of timekeepers and include links to PeopleSoft documents, job aids, District procedures, and monthly timekeeping tips.
https://staff.sandiegounified.org/departments/payroll/timekeepers_payroll_resources
- **Financial Accounting.** Please contact the Financial Accounting department for weekly SchoolCash trainings. Employees can register for trainings through the Professional Learning website, linked below.
<https://sandiegounified.truenorthlogic.com/ia/empari/tab/home>

Vacation Considerations

In instances where scheduling and taking vacation time may be difficult to manage for both the employee and the supervisor, Labor Relations and Human Resources provide some suggestions for managers and principals to closely monitor and manage vacation balances with employees:

- In order to provide a balanced and equitable approach to managing vacation approvals, work with employees to identify and submit vacation plans at the start of their work year for the entire year, knowing that individual needs arise outside of advanced planning.
- Consider prioritizing requests around those with balances that exceed the district maximum accrual.
- Continue to monitor throughout the year to ensure employees will remain below the 328 hours when August 31st arrives. **Please note:** Employees with a vacation balance higher than 328 hours as of August 31 of each year will be paid the difference between their balance and the 328, which is an expense that will be paid from your department or site account.

Additional Considerations

A few other areas to note going into the school year are:

- **Overtime and extra time.** Supervisors should ensure all employees understand that overtime and extra time opportunities require prior supervisory approval.
- **Volunteers and contract work.** The use of volunteers or contract work is limited to work that is *not* usually and customarily performed by bargaining unit members.

Questions regarding the above should be directed to Human Resources or Labor Relations:

Human Resources			
HRO Area A	Ryan Leighty	rleighty@sandi.net	(619) 725-7258
HRO Area B	Ann Cato	acato@sandi.net	(619) 725-8070
HRO Area C	Maria Quidachay	mquidachay@sandi.net	(619) 725-7053
HRO Area D	Thesala Jones	tjones6@sandi.net	(619) 725-8062



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HRO Area E	Cara Marshall	cramsey@sandi.net	(619) 725-7239
HRO Area 7	Litta Buras	lburas@sandi.net	(619) 725-7324
Labor Relations			
Director	Kristie Jones	kjones5@sandi.net	(619) 725-8138
Labor Relations Specialist	Adrianna McGinley	amcginley@sandi.net	(619) 725-8178