

CSEA/DJUSD Secretary Study Report

This report was created by Jim Herrington (CSEA President), Patty Liverman (CSEA Vice President) and Matt Best (DJUSD Associate Superintendent) and is designed to provide the reader with a thorough understanding of the DJUSD/CSEA Secretary Classification Study conducted from 2014-15. This study was jointly initiated by the district and CSEA leadership personnel to better understand what was happening within the secretary classification. The last study of this type was conducted nearly 15 years ago and since then, several reclassification requests within the Secretary classification have precipitated the need to conduct this current study.

The study team's recommendations and rationale contained in this report will be presented to the Superintendent and Board of Education in May or June 2015.

Methods

Jim Herrington, CSEA President and Associate Superintendent Matt Best interviewed the 55 secretaries employed by the Davis Joint Unified School District during the 2014-15 school year. These 55 interviews were conducted over the span of 3 months.

The subjects were asked to complete a detailed questionnaire, which helped the study team to better understand the job duties of each person. Additionally, each of the subjects were interviewed about:

1. The scope of their job description,
2. Tasks in the job description they weren't doing,
3. Tasks they were doing that were not captured in the job description,
4. Training needs they would like to see provided for their professional development;
and
5. Staffing needs at the site or department, and departmental/site relations.

The study team completed a salary comparison between DJUSD secretarial positions and those of nearby similar-sized districts.

Findings

The following findings are broken into areas of concerns based on the questionnaire and interview data.

Job Descriptions Updates

There was general consensus to change the name of the classification and move away from the term 'secretary.' Those working directly for an administrator seemed to favor 'administrative assistant,' while those in a more general position did not have a particular change in mind.

There was general consensus that no one does or had done 'dictation' in many years and the reference should be removed from the job description. The elementary secretaries, in

particular, believed that 'administration of basic first aid' or something similar should be added to the job description as there is a fair amount of band-aid application, administering ice packs, etc. The Secretary II job description does not include the administration of first aid.

General Job Classification Overview

Throughout our interviews, the study team found that almost all secretaries believed what they were doing was contained in their job description. However, it was apparent that a few employees were actually working out of class. These employees had not requested a reclassification or even a review.

Training needs

Many secretaries expressed an interest in job related professional growth opportunities, especially related to technology. There was also consistent interest in having time to collaborate with colleagues with similar duties on topical issues such as attendance procedures and develop standard operating procedures for themselves and others. Around the same time as the interviews were taking place for this study, the district initiated a classified professional growth system, which included a survey of staff to determine professional growth offerings.

First Aid: Minor and Emergency

Secretaries at sites with high numbers of students with serious allergies or diabetes reported significant concern about the level of medical response they were responsible for administering. They reported that there was generally an incident at least once per week at those sites and when the assigned paraeducator or nurse was not available they were responsible for responding to the student's medical condition. It was clear that this situation did not exist at all sites, but those sites with increased numbers of medically fragile students was notable.

Dedicated Funding for Secretarial Substitutes

One of the primary concerns for all secretarial staff was the lack of dedicated funding for secretarial substitutes. During the budget crisis the district made a decision to charge secretary substitute expenditures of fewer than 5 days to the site budgets. Since that time secretaries and principals have reported feeling very conflicted about using "limited site dollars" for substitutes. Generally secretaries are either not taking days off or not requesting a substitute. Both of these circumstances create a hardship for the employee or the school site. In addition, secretaries have infrequently participated in professional development during the school day unless absolutely necessary or required.

Trained Substitutes

Another issue closely related to substitute funding is the availability of trained substitutes. The Personnel Office has begun to recruit and train clerical substitutes to perform essential duties such as taking attendance, managing certificated substitutes and servicing the public, when subbing for an employee. However, the number of trained substitutes (mostly retired secretaries from DJUSD) is currently insufficient. This issue is closely related to dedicated funding for substitutes as the substitutes are usually unwilling to commit time to be trained if they will not have consistent work.

Reclassification Requests and Classification Related Concerns

The district has received several reclassification requests from secretaries and related classifications over the past several years. The secretary classification is one of the few

classifications in DJUSD where every level of classification is built upon the one below. As a result, it is very difficult to look at one area of concern without looking at the whole. As the study team conducted this study, it looked at both the individual concerns and the classification as a whole. The three main areas of perceived concerns were: 1.) The gap between account technician pay and secretarial classifications for similar types of work, particularly purchase orders, budgeting and invoicing. 2.) The change in job duty volume and 'flexible time' over the past 7-9 years. 3.) Classification related concerns, which arise when an employee finds herself performing a distinct task from a job classification that is paid at a higher range.

Account Technician and Secretarial Classification Pay Gap

There is a perception amongst many secretaries that there is a gap in pay between the work they are doing for an increasing amount of their time and the work that is being completed by Accounting Technicians II & III's. Most notably, Site Administrative Secretaries reported that they perceived there had been an increase in the volume of fiscal-related demands on site secretaries beginning in 2007-08. Moreover there is concern about the 5-7 range pay differential (12.5% - 17.5%) between those positions.

In order to more completely understand this issue, the study team analyzed regional salary comparisons for our equivalent secretary and fiscal positions. The analysis is outlined in the charts below.

Secretary I Regional Range*	\$11.24 - \$18.87
DJUSD	\$13.40 - \$17.10
Secretary II Regional Range*	\$13.18 - \$19.37
DJUSD	\$14.07 - \$17.96
Site Admin Secretary I Regional Range*	\$15.54 - \$23.89
DJUSD	\$15.89 - \$20.27
Site Admin Secretary II Regional Range*	\$16.18 - \$22.53
DJUSD	\$16.29 - \$20.79
Department Secretary Regional Range*	\$14.97 - \$23.01
DJUSD	\$16.29 - \$20.79

*Includes Washington Unified, Woodland Unified, Dixon Unified and Vacaville Unified

The study team determined that the responsibilities of secretaries and fiscal staff are regionally comparable. Many districts have unique job descriptions, which are delineated by unique tasks (i.e. Attendance Secretary, Payroll Technician, etc), while others, including DJUSD have more general job descriptions (i.e. Secretary II, Accounting Technician II, etc.). While the structure of the positions may be slightly different, the pay differential between DJUSD secretary classification and the accounting technician positions, in particular, was not abnormal.

Changes in volume and 'flexible time'

One of the most significant changes in the secretary workload over the past several years has come in the increased expectations related to accountability. Secretaries

are responsible for a higher volume of fiscal accountability procedures than they were 7-9 years ago. As a result the ebb and flow of site duties has changed, putting an increased demand for tasks that occur more frequently like fiscal procedures and decreased the time available for big projects such as student registration.

Classification Related Concerns

The primary classification related concerns stem from a belief that an employee is doing distinctive tasks from a classification paid at a higher rate. The study team found three areas of concern related to employees doing work outside of their classification. 1.) The Secretary II in the Special Education Department was doing tasks specifically outlined in the Department Secretary position for at or about fifty percent (50%) of her time. 2.) The Department Secretary in the Special Education Department was doing tasks not found in another job description for at or about fifty percent (50%) of her time. These tasks included employing a high degree of independent judgment, maintaining a specialized database and the scheduling of employees and students. 3.) The Department Secretary in the Information Technology Services Department was doing tasks specifically outlined in the Information Technology Specialist I job description for at or about fifty percent (50%) of her time. We did not find that there were other classification concerns in other positions in the secretary classification. However, we noted that the tasks of particular positions at particular sites varied quite widely, especially the Secretary II position at the Junior High Schools. It seems that the leadership of the school, physical layout of the office, seniority and competence of the individuals greatly influences the tasks that these employees routinely complete at each site.

Staffing

Interestingly, when asked if the site/department was appropriately staffed, almost all secretaries responded "yes." The only exceptions noted were for sites that were experiencing perceived performance issues from one or more members of their front office team or more commonly for periods of short, but intense periods of time. The study team asked all pointed questions about use of 'extra help' for those periods. Many seemed to be using extra help for the intense periods (testing, registration, heavy data entry), but many reported not having qualified help and were interested in having trained help for some task or were not using extra help.

Organizational Communication & Clear expectations

Several secretaries brought up concerns regarding organizational communication and ensuring clear expectations for employees "down the line." Concerns raised included the failure of site principals to convey important information received at district meetings, to the failure of district administrators to communicate changes in policy or procedure to affected staff.

Recommendations

Professional Culture

The District should invest resources to continue to improve the professional culture for the secretaries of DJUSD. Recommended outcomes in this area could include:

- Increased collaborative opportunities between secretaries and other district staff who work regularly with secretaries.
- Improved efficiency within the organization through two-way dialog and innovative problem solving.

- Improved quality and frequency of communications to ensure that secretaries are respected, clear about their responsibilities when given direction, have an outlet to share concerns in a constructive way and view themselves as valued and integral members of the DJUSD Team.
- Formation of a feedback team to provide substantive feedback both to secretaries, administrators and district staff on these topics.
- Restructuring of district wide secretaries meetings to ensure they are held frequently, are useful to the participants and work to promote the professional culture outlined above.
- Explore making consistent procedures and related Professional Development mandatory.

Reclassification

The Study team also recommends the following reclassifications:

- The SPED Department Secretary II to 50% Department Secretary (while retaining 50% Secretary II)
- The IT Department Secretary to 50% Information Technology Specialist I (while retaining 50% Department Secretary)

Job Description Update

The team recommends updating all secretary classification job descriptions to remove dictation.

Change the title of Site Administrative Secretary position to Site Administrative Assistant.
Change the title of the Department Secretary position to Department Administrative Assistant.

Staffing and Other Support

The team recommends a line item in each site/department budget to cover the cost of secretarial substitutes and the training of a cadre of substitutes who can perform essential functions for those secretaries who are absent. District staff expects this to increase general fund expenditures by less than \$10K.

Additionally, the team recommends continued notification to all elementary sites that funds are available to hire extra help, especially for registration and periods of heavy data entry. Associate Superintendent Bryant will continue to work on this goal.

The district has already begun, and will continue to train substitutes for service at school sites in the areas of attendance, substitute management, basic site secretarial duties and Q registration.

First Aid

The team recommends the inclusion of first aid into the Secretary II job description. We also recommend that the district and CSEA continue to look at creative ways to decrease the impact medical situations and related angst put on secretarial staff.

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Compensation

- Explore a phased in increase in secretarial compensation by classification, to be done in negotiations. This compensation recommendation is not clear
- Explore adjusting the number of years required to achieve longevity steps, to be done in negotiations.
- Explore the addition of a 5th professional development step, to be done in negotiations.

Continuing Classification Studies

Review List of Job Classifications in this order for the remainder of 2015 and into 2015-16.

- SNS Department Positions
- Human Resources Technician
- Library Technician I & II
- Paraeducator III