Oakland Unified School District

Comparative Organizational Structure and Staffing Review

October 21, 2021

Prepared By:

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Vice President

School Services of California, Inc.
An Employee-Owned Company

SCHOOL SERVICES OF CALIFORNIA, INC.

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Executive Summary

Purpose, Scope, and Methodology

The Oakland Unified School District (District) requested that School Services of California Inc. (SSC) conduct a Comparative Organizational Structure and Staffing Review of the District's Finance Division, the Information Technology Services Department, and the Talent Division as compared to a group of unified school districts with similar characteristics. The analysis includes a review of job classifications and functions handled by the Finance Division (including Payroll, Budget, Risk Management, Procurement, Accounting, and Accounts Payable), the Information Technology Services Department, and the Talent Division.

SSC conducted virtual interviews with District leadership team members to discuss job responsibilities, staff workload, channels of communication, division of responsibilities, and the perceived effectiveness and efficiency of the current organizational structure for the divisions/department under review.

The following six comparative districts participated by providing some or all the data requested. The comparative district group was selected based upon similar enrollment and district type—unified school district serving grades K–12. These elements are industry standard factors used to evaluate staffing levels between school districts. Enrollment size and district type allow for similar economies of scale to be evaluated as well as similar programs provided by grade levels. The district funding type was also considered, and basic aid or community-funded school districts were excluded due to the high variances of revenue. While enrollment is an important factor when comparing staffing across school districts, the number of schools served also has an impact on the staffing required to deliver services directly to school programs. Due to the high number of schools present in the District, one comparative district—Fresno Unified School District (USD)—was included as a school district with more similar number of schools, even though the enrollment is almost double that found in the District. It is also important to note that the number of schools is used as a ratio divisor, but it is assumed that in addition to the schools served, the divisions/departments included in this review also support the district/central office and other non-traditional school programs.

Figure 1: Comparative District Group

County	District Name	2020–21 Enrollment	Number of Schools[1]	2020–21 UPP[2]
San Bernardino	Fontana USD	35,461	45	87%
Fresno	Fresno USD	69,709	100	89%
Riverside	Moreno Valley USD	31,593	39	84%
Alameda	*Oakland USD*	*35,489*	*81*	*76%*
Riverside	Riverside USD	39,443	47	67%
Orange	Santa Ana USD	43,917	54	88%
San Joaquin	Stockton USD	33,943	56	82%

Source: California Department of Education (CDE), DataQuest
[1]2020-21 list of schools from DataQuest—does not include district/central office or non-traditional school programs (e.g. charter schools, child development centers, nonpublic schools)
[2]UPP: Unduplicated Pupil Percentage

The data contained within this report was collected by a survey of the comparison districts and is as complete and accurate as the districts were able to provide.

For each functional area, SSC staff provide calculations of the number of students enrolled per full-time equivalent (FTE) position for the District and all comparative districts. Five of the six comparative districts have similar enrollment levels as compared to the District, but there is some variation with the inclusion of Fresno USD, so this student enrollment per FTE calculation allows for the best comparison in evaluating service levels provided across each district. The enrollment-to-staffing ratios will be presented and ranked from lowest ratio to highest ratio. A low enrollment-to-staff ratio indicates that a school district has more staff relative to enrollment—a higher level of staffing as compared to the similar district group. A high enrollment-to-staff ratio indicates that a school district has fewer staff relative to enrollment—a lower level of staffing as compared to the similar district group. This ratio is an important factor to consider when evaluating the staffing of divisions/departments providing direct services to schools and programs, students, and employees, as the number of staff relative to the size of the school district can have a direct impact on the level of services provided.

General Observations

While enrollment is an important factor when comparing staffing across school districts, the number of schools served also has an impact on the staffing required to delivery services directly to schools. When compared to districts of similar total enrollment size, the District has between one and a half and two times the number of schools. The average number of schools for the comparative district group with comparable enrollment is 49— almost 40% less than the number of schools found in the District (81). When compared to Fresno USD with enrollment almost double the District at 69,709 and 100 schools, the District has just 19 fewer schools.

Figure 2: Comparative District Group—Number of Schools

County	District Name	2020–21 Enrollment	Number of Schools	Number of Oakland USD Schools Relative to Comparative District
Riverside	Moreno Valley USD	31,593	39	2.1
San Bernardino	Fontana USD	35,461	45	1.8
Riverside	Riverside USD	39,443	47	1.7
Orange	Santa Ana USD	43,917	54	1.5
San Joaquin	Stockton USD	33,943	56	1.4
Fresno	Fresno USD[1]	69,709	100	0.8
Alameda	*Oakland USD*	*35,489*	*81*	N/A

Source: CDE, DataQuest and District provided list of schools (see Attachment A)
[1]Fresno USD was included in the comparative district group to represent a district with a similar number of schools found in the District.

This factor creates challenges when comparing staffing to other districts and has a direct impact on the District's staffing needs to support the higher number of schools. Staffing a higher number of schools has an impact on central office services like human resources functions including recruitment, hiring, onboarding, employee performance management; technology support of schools; and business services functions such as payroll and budget monitoring. A higher level of service required from the central office to meet the needs of school staff influences the ability of the District to reduce staffing levels.

Beyond the positions needed to staff a school (including principals, vice principals, office staff, teachers, and support services, maintenance, operations, and grounds positions), direct services provided to the schools by central office services are impacted by the larger number of schools served. For example, the Information Technology Services Department would need to staff at a higher level to provide technical support to 81 schools versus the average of 49 schools found in the comparable district group of similar student enrollment. If a technician is assigned to support five schools, 17 full-time positions are needed to support the District's 81 schools, while only 10 full-time positions are needed to support the average of 49 schools found in the comparative districts of similar enrollment size. The large number of schools in the District require more staff to support, and economies of scale are reduced leading to less efficient provision of services.

In addition to the 81 schools, the District also operates a robust child development program, with 15 standalone child development centers that are also supported by the Finance and Talent Divisions and the Information Technology Services Department.

Examination of data using the number of FTEs and proportionality provides a foundation from which to start analysis but is not definitive absent context. Local factors often have a major impact on staffing realities in educational agencies. During fieldwork, staff shared some of the factors that make Oakland USD unique when compared to other districts, including factors such as a high

percentage of free or reduced-priced meal eligible students, highly decentralized decision-making structure and procedures and functions, high staff turnover, and lack of standardization.

Additionally, District staff report that in their experience, District initiatives can change quickly. The impact of this practice on staffing is twofold. First, planning time and effort is expending on new initiatives, redirecting staff from their existing work. Second, change must be communicated quickly and clearly to all involved parties. If this does not occur, staff can spend time trying to understand how a change impacts their role, current work, and direction, again redirecting staff from their existing work.

The rate of change and pursuit of new Board of Education (Board) initiatives has had a substantial impact on central services and staff's ability to provide efficient, high-quality operations for the benefit of students, staff, and community. Fieldwork highlighted the pace at which new Board initiatives were selected for implementation as a concern, and how Board initiatives can conflict with each other and create service gaps and technical capacity issues. When a school district's initiatives are not aligned with the district's strategic goals, it becomes important for the board and superintendent to provide clarity regarding the rank order of priorities. This is necessary because school districts receive enough money to do many things, but not enough to do everything. Compounded by staff turnover and role ambiguity, the operational reality created in the District is one where many staff are still in learning mode, or where tasks are pushed from desk to desk without concern for the impact to the end customer. When role ambiguity exists and operations are driven by tasks rather than customer satisfaction and strategic goal attainment, a "that's not my job" mentality is predictable. The resultant condition is often shaped by the strongest personalities within each unit rather than what's best for students and staff. In situations like this, it is incumbent upon administration (manager to assistant superintendent) to be active, hands-on partners with the team to achieve complex goals. The more complex the problem, the more hands-on leadership needs to be, especially in the problem identification and solution generation phases. Complex problems also require deeper stakeholder input, meaning customers and frontline staff need to have input as processes are developed, rather than a pure top-down leadership approach. Only then, can tasks be broken down in level of complexity to ensure they are appropriate for departmental staff.

Providing flexibility and support to school leaders empowers them to make decisions in the best interest of their students and community. Conversely, complete school autonomy increases system-wide cost caused by misaligned calendars (overlapping workdays), uncoordinated bell times (for transportation), and an unwillingness to follow procedures intended to support legal compliance, such as with procurement. These dynamics have an effect on the District's ability to effectively and efficiently provide services and can also put strain on the organizational structure and staff. The unique factors that influence staffing in each division/department under review will be considered in the following sections of the report.

Based upon the information received through the virtual interviews with staff and a review of the documents provided, SSC has formulated recommendations for organizational and procedural

changes aimed at improving the overall efficiency and effectiveness of the divisions/departments under the scope of the review.

Summary of Staffing

The summary comparison of District office positions supporting the functions under review is provided in figure 3. In terms of absolute FTE, the District reported the second lowest staffing level at 115.35 FTE, just above Stockton USD at 108.00 FTE. The comparative group ranges from 108.00 FTE in Stockton USD to 211.65 FTE in Fresno USD. The second highest FTE was reported in Santa Ana USD at 127.47 FTE. In terms of enrollment-to-staff ratios, the comparative group ranges from 250.74:1 in Moreno Valley USD to 344.53:1 in Santa Ana USD. The District ranks 3 of 7 at 307.66:1.

Consideration must also be given to the larger number of schools the District operates—more than double the comparative districts of similar enrollment. Because many of the functions under review provide direct services to schools, a comparison of FTE per school is also provided. The comparative group ranges from 3.23 FTE per school in Moreno Valley USD to 1.42 FTE per school in the District, indicating that the District has fewer staff in the functions reviewed to support the schools and associated operations.
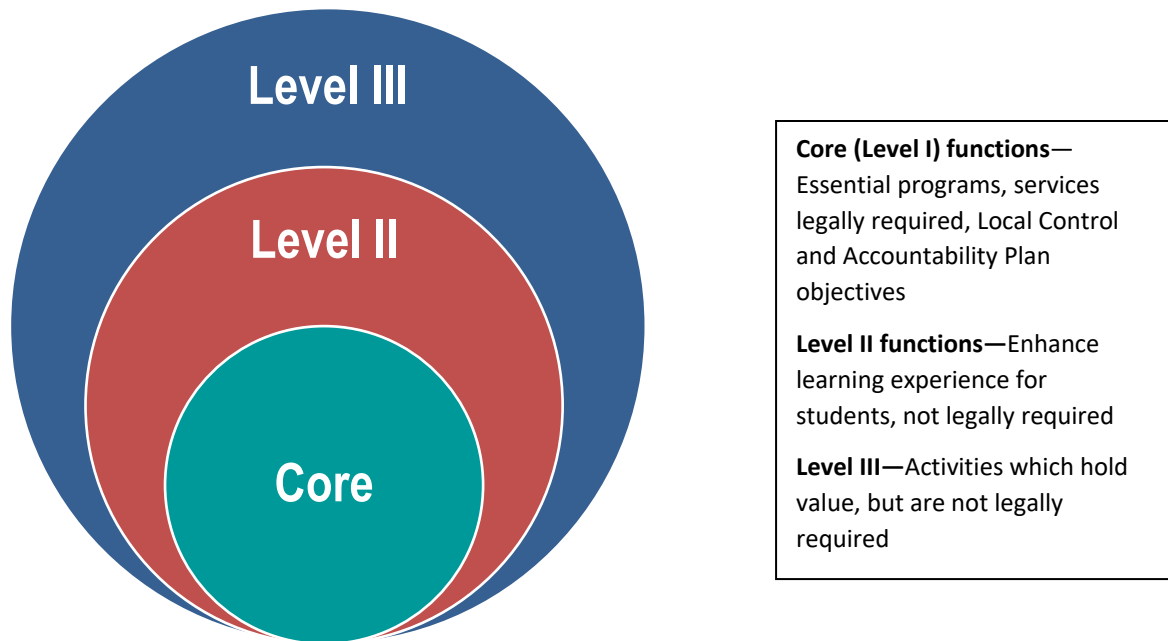
Figure 3: Summary of Staffing

Division/Department	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Finance—Accounting, AP, Budget, Payroll	35.00	47.65	26.00	**32.80**	32.00	35.00	32.00
Finance—Procurement	6.00	17.00	7.00	**4.00**	9.00	9.00	8.00
Finance—Risk Management	3.50	13.00	5.00	**8.75**	8.00	10.00	9.00
Information Technology Services	54.00	93.00	33.00	**26.00**	44.00	29.00	28.00
Talent	27.00	41.00	55.00	**43.80**	27.00	44.47	31.00
Total FTEs	*125.50*	*211.65*	*126.00*	*115.35*	*120.00*	*127.47*	*108.00*
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment per FTE	**282.56**	**329.36**	**250.74**	**307.66**	**328.69**	**344.53**	**314.29**
Rank	**2**	**6**	**1**	**3**	**5**	**7**	**4**
Number of Schools	45	100	39	81	47	54	56
FTE per School	**2.79**	**2.12**	**3.23**	**1.42**	**2.55**	**2.36**	**1.93**
Rank	**2**	**5**	**1**	**7**	**3**	**4**	**6**

As noted earlier in this analysis, while this staffing data is provided for comparison purposes, there are many factors that can influence a district's staffing such as available financial resources, differing programmatic emphasis, number of facilities and programs served, which services are contracted out, etc., though enrollment is typically the primary factor. The economies of scale for larger districts have an impact on the numbers of staff positions. In other words, there must be a certain number of staff positions to handle the centralized functions required for each district, and the staffing levels are, to a lesser extent, related to enrollment. It should also be noted that because of the large number of schools operated by the District, many of the economies of scale one would expect to find are absent, as a higher level of staffing is required to support the operational functions associated with individual schools.

The process to assess the current staffing levels and identify areas that can sustain adjustment includes a shared responsibility approach which requires collaboration and partnerships within the school community. The focus should be on activities that are central to attaining instructional goals and support operational management. The first step in the assessment process includes an evaluation of essential services and programs, and the staffing levels assigned to support those functions as illustrated in figure 4.

Staffing levels should reflect the resources needed to support initiatives and goals, and every school district will produce a unique list due to the variance of student populations and communities they serve.

Figure 4: Identification of Services

Core (Level I) functions—Essential programs, services legally required, Local Control and Accountability Plan objectives

Level II functions—Enhance learning experience for students, not legally required

Level III—Activities which hold value, but are not legally required

The consideration of operational impacts is critical, as the elimination of services in one function impacts student support and instructional programs in other areas. Operational services and student learning intersect in many ways, and recognition of how school staffing levels influence central office staffing should be included in decisions related to department staffing allocations.

Recommendations

While the District should consider all the findings and recommendations provided in the report, specifically, we highlight the following:

- The proportion of management and confidential positions compared to all staff positions in the Finance Division's Accounting, Accounts Payable, Budget, and Payroll Department and Risk Management Department should be examined

- Review of the lower number of Procurement Department staff relative to all other districts, specifically in the purchasing technician and buyer job classifications (nonmanagement) to determine if the staffing level supports the needed functions and services

- Reorganization of the Talent Division to minimize the separation of duties and increase the integration of services for employee support for schools and the central office, HR operations, and recruitment, residency, and retention services

- Revision of job titles for Talent Division positions, as well as revision of the Division name to align with industry standard

- Assessment of clerical and administrative support in the Talent Division to align with support needs

- An evaluation of staffing of the Information Technology Services Department to address school support needs as well as additional management and clerical support required as a result of the findings

- Reorganization of the Information Technology Services Department by functional area to align functions and oversight

- Evaluation of the District's technology procedures and standards to ensure the selection of technology that is supportable by the Department and aligns with the District's technology needs and plan

All areas of district staffing should periodically be evaluated to ensure staffing levels are appropriate, with focus on the District's priorities and goals as defined by the Board and District leadership, as well as available financial resources. This report should serve as a baseline for future analysis by the District as it evaluates its staffing and organizational needs.

Scope and Methodology

Purpose and Scope

The Oakland Unified School District (District) requested that School Services of California Inc. (SSC) conduct a Comparative Organizational Structure and Staffing Review of the District's Finance Division, the Information Technology Services Department, and the Talent Division as compared to a group of unified school districts with similar characteristics. The analysis includes a review of job classifications and functions handled by the Finance Division (including Payroll, Budget, Risk Management, Procurement, Accounting, and Accounts Payable), the Information Technology Services Department, and the Talent Division.

Methodology

SSC conducted virtual interviews with District leadership team members to discuss job responsibilities, staff workload, channels of communication, division of responsibilities, and the perceived effectiveness and efficiency of the current organizational structure for the divisions/department under review.

The Comparative Organizational Structure and Staffing Review also included the following:

- Identification of a list of districts with similar characteristics to use for comparison

- Identification of the current organizational structure and staffing levels in the divisions and department under review, including a general overview of the reporting responsibilities and functions handled within the divisions/department

- Collection of district office organizational structure and staffing data

- Detailed implementation suggestions that included changes in the organizational structure and/or staffing of the divisions/department under review

The following six comparative districts participated by providing some or all the data requested. The comparative district group was selected based upon similar enrollment and district type— unified school district serving grades K–12. These elements are industry standard factors used to evaluate staffing levels between school districts. Enrollment size and district type allow for similar economies of scale to be evaluated as well as similar programs provided by grade levels. The district funding type was also considered, and basic aid or community-funded school districts were excluded due to the high variances of revenue. While enrollment is an important factor when comparing staffing across school districts, the number of schools served also has an impact on the staffing required to deliver services directly to school programs. Due to the high number of schools present in the District, one comparative district—Fresno Unified School District (USD)—was

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[2]UPP: Unduplicated Pupil Percentage

The data contained within this report was collected by a survey of the comparison districts and is as complete and accurate as the districts were able to provide. The primary sources of information provided by the participating districts consisted of the following:

- Position control reports for the 2020–21 school year

- Employee rosters

- Organizational charts

- Other documents indicating staffing levels, organizational structure, and/or reporting responsibilities

For each functional area, SSC staff provide calculations of the number of students enrolled per full-time equivalent (FTE) position for the District and all comparative districts. Five of the six comparative districts have similar enrollment levels as compared to the District, but there is some variation with the inclusion of Fresno USD, so this student enrollment per FTE calculation allows for the best comparison in evaluating service levels provided across each district. The enrollment-to-staffing ratios will be presented and ranked from lowest ratio to highest ratio. A low enrollment-to-staff ratio indicates that a school district has more staff relative to enrollment—a higher level of staffing as compared to the similar district group. A high enrollment-to-staff ratio

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Based upon the information received through the virtual interviews with staff and a review of the documents provided, SSC has formulated recommendations for organizational and procedural changes aimed at improving the overall efficiency and effectiveness of the divisions/departments under the scope of the review.

What follows are SSC's observations and analyses of the operations of the divisions/departments along with our recommendations, where appropriate, for operational changes to improve efficiency and performance.

Overall Observations

Organizational structure and staffing play a key role in an agency's ability to function effectively. A well-designed organization with appropriate staffing levels provides clearly defined decision-making authority, information flow, and the roles and responsibilities of employees. To attract and retain quality people, there needs to be a clear career path and progression ladder to enhance the knowledge base and personal development for employees.

It should be noted that, while this staffing data is provided for comparison purposes, there are many factors that can influence a school district's staffing such as available financial resources, differing programmatic emphasis, number of facilities served, which services are contracted out, etc., though enrollment is typically the primary factor. The figures are designed to show the staffing for each of the District's divisions under review.

The report is organized by the following functional areas under the scope of review:

- Finance Division (Payroll, Budget, Risk Management, Procurement, Accounting, and Accounts Payable)

- Talent Division

- Information Technology Services Department

While enrollment is an important factor when comparing staffing across school districts, the number of schools served also has an impact on the staffing required to delivery services directly to schools. When compared to districts of similar total enrollment size, the District has between one and a half and two times the number of schools. The average number of schools for the

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[1]Fresno USD was included in the comparative district group to represent a district with a similar number of schools as found in the District.

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These dynamics have an effect on the District's ability to effectively and efficiently provide services and can also put strain on the organizational structure and staff. The unique factors that influence staffing in each division/department under review will be considered in the following sections of the report.

Finance Division

In this section, the Finance Division including Accounting, Accounts Payable, Budget, Payroll, Procurement, and Risk Management functions were analyzed. The remaining departments within the Business Services Division—Facilities, Logistics (Warehouse and Transportation), Strategic Resource and Planning, and Food Services—were not included in the scope of this study.

In terms of total FTE, the District has 45.55 FTE staff to support the Finance Division functions under review. The comparative districts range from 38.00 FTE in Moreno Valley USD to 77.65 FTE in Fresno USD. The enrollment-to-FTE ratio ranges from 692.71:1 in Stockton USD to 897.73:1 in Fresno USD. The District's ratio of 779.12:1 ranks 2 of 7 in the comparative group, indicating that the District has more staff relative to students enrolled than all but one comparative district.

Figure 3: Finance Division Overall Staffing

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	44.50	77.65	38.00	**45.55**	49.00	54.00	49.00
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Enrollment/FTE	796.88	897.73	831.39	**779.12**	804.96	813.28	692.71
Rank	3	7	6	**2**	4	5	1

In the District, supervision and oversight is provided by the Chief Business Official, who leads department heads for each function listed in the first paragraph of this section. Staffing variations between comparison districts causes substantial swings in comparative data. The District is the only one in the comparison group charging partial FTEs for a Staff Attorney (0.25 FTE) and a Law Clerk III (0.50 FTE) to the Finance Division. Two of the comparison districts have employee benefits under the supervision of business services, while most others place that activity under the human resources function.

Figure 4 shows the total FTEs by job type for each comparison district including management, departmental, and clerical. In the comparison group, management FTEs ranged from 8.00 in Moreno Valley USD and Riverside USD to 37.00 in Fresno USD. Department staff FTEs ranged from 13.00 in Fontana USD to 39.00 in Santa Ana USD. Clerical staffing FTEs ranged from 2.00 in Santa Ana USD to 6.50 in Fontana USD.

Figure 4: Finance Division FTEs by Job Type

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Management Staff	25.00	37.00	8.00	**25.75**	8.00	13.00	13.00
Department Staff	13.00	34.65	25.00	**17.00**	37.00	39.00	33.00
Clerical Staff	6.50	6.00	5.00	**2.80**	4.00	2.00	3.00
Total FTE	44.50	77.65	38.00	**45.55**	49.00	54.00	49.00

Figure 5 shows the relative proportion of each position (management, departmental, and clerical) to the total FTE count for each of the comparison districts. The proportion of management FTEs to total FTEs ranged from 16.3% in Riverside USD to 56.5% in the District. The comparison group average of management FTEs was 35.5%, which is 21% less than the management FTE proportion found in the District. Departmental FTEs proportionality ranged from 29.2% in Fontana USD to 75.5% in Riverside USD. The average departmental staffing proportionality was 55.1%, with the District at 30.7%, or the second lowest in comparative terms. Clerical FTE proportionality ranged from 3.7% in Santa Ana USD to 14.6% in Fontana USD, with the District at 6.1%, tied for the second lowest.

Figure 5: Finance Division Percent of Total FTE by Job Type

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Management Staff	56.2%	47.6%	21.1%	**56.5%**	16.3%	24.1%	26.5%
Department Staff	29.2%	44.6%	65.8%	**37.3%**	75.5%	72.2%	67.3%
Clerical Staff	14.6%	7.7%	13.2%	**6.1%**	8.2%	3.7%	6.1%

Examination of data using the number of FTEs and proportionality provides a foundation from which to start analysis but is not definitive absent context. Local factors often have a major impact on staffing realities in educational agencies. During fieldwork, staff shared some of the factors that make Oakland USD unique when compared to other districts, including factors such as a high percentage of free or reduced-priced meal eligible students, highly decentralized decision-making structure and procedures and functions, high staff turnover, and lack of standardization.

Providing flexibility and support to school leaders empowers them to make decisions in the best interest of their students and community. Conversely, complete school autonomy increases system-wide cost caused by misaligned calendars (overlapping workdays), uncoordinated bell times (for transportation), and an unwillingness to follow procedures intended to support legal compliance, such as with procurement. For example, each school is allowed to procure its own supplies and services, which, on its face, is not a bad practice. However, when multiple schools purchase the same materials or services and their combined purchase exceeds the bid threshold, the District has violated the law. Decentralized purchasing means that most of the purchasing activity takes place at the school-level or departments, with limited centralized service assistance. The District currently staffs the Procurement Department with one director who has responsibility over the transportation and warehouse functions, 1.00 FTE Analyst, and 2.00 FTEs Buyers, while the majority of the

comparison districts have between 6.00 to 8.00 FTEs to accomplish the same work. The Procurement Department exists to protect the District with clear contract language that also mitigates future liability, all while buying at the best possible value (price over the lifetime of an asset or service). Even in a distributive decision-making environment, schools want the best support available, but the District staff alignment is more suited for survival than best-in-class service. Fieldwork highlighted perceptions that school staff do not observe or follow policies and procedures developed by central services departments, regardless of the rationale (legal or to increase overall service levels). Staff shared their inability to convey or train leaders on new policies and procedures and identified a lack of access to staff as a key contributor to this challenge (i.e., not being able to attend staff meetings at schools or centrally). Complicating matters, staff turnover means a low percentage of school-level staff have the training or experience to operate independently under the limited existing policies and procedures.

Distributive decision-making combined with limited willingness to partner to implement policies and procedures has created a demand for higher-level support staff to meet the shifting needs of school and departmental leaders, skewing the balance between management staff, departmental staff, and clerical staff. Best practices dictate that each activity should be completed at the organizational level appropriate for the task. In districts with highly developed and ingrained policies and procedures supported by a culture of participatory leadership and support, the majority of staff would be departmental and clerical, often with only enough clerical to support departmental administration. The operational reality in the District's Finance Division demonstrates the inverse: the District's Finance Division has the highest number of management FTE and the highest percentage of management positions relative to all Division staffing. This would lead one to deduce that the District's Finance Division has increased administrative/management roles to meet the demands of local operations. Stability, aligned strategic goals, centralized processes implemented with fidelity District-wide, and an expectation of collaborative teamwork for the betterment of students, staff and community will help the Finance Division achieve greater efficiency and realign roles for a more balanced organizational structure.

Finance Division Staffing—Accounting, Accounts Payable, Budget, and Payroll

The District's Finance Division has 32.80 FTE staff to support the District's Accounting, Accounts Payable, Budget, and Payroll functions. The comparative districts total staff FTE range from 26.00 FTE in Moreno Valley USD to 47.65 FTE in Fresno USD. The enrollment-to-FTE ratio ranges from 1,013.17:1 in Fontana USD, representing the comparative district with the most staff relative to student enrollment, to 1,462.94:1 in Fresno USD, representing the comparative district with the fewest staff relative to student enrollment. The District's ratio at 1,081.98:1 ranks 3 of 7 in the comparative group, indicating that the District has more staff relative to students enrolled than four of the comparative districts.

It should be noted that the District has a relatively high number of positions designated as management or confidential that are highly skilled technical positions; for example, 13.00 of the 19.00 FTE are Analyst and Accountant positions. The District's total management FTE of 19.00 is the second highest of the comparative group, after Fontana USD and Fresno USD, tied at 21.00 FTE. When examining the department-level staff, the District has the second lowest total FTE at 12.00. This demonstrates that the District's positions to support the Accounting, Accounts Payable, Budget, and Payroll functions appear to be comparable in terms of absolute FTE; however, a much higher percentage of the District's positions are classified as management as compared to the other districts. This practice could have implications for higher employee salary costs relative to other districts with fewer management positions, as well as an imbalance of technical versus supervisory support available to the Finance Division.

Figure 6: Finance Division Staffing—Accounting, Accounts Payable, Budget, and Payroll

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
Management Staff		*Reports to the Deputy Superintendent of Administrative Services*				*Reports to the Deputy Superintendent of Administrative Services*	
	Associate Superintendent, Business Service	Chief Financial Officer	Chief Business Official	**Chief Business Official**	Chief Business Officer and Governmental Relations	Assistant Superintendent, Business Services	Chief Business Official
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00
	Executive Director, Fiscal Services	Executive Officer, Fiscal Services					
	1.00	1.00					
		Executive Director, Payroll					
		1.00					

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
		Director, Accounting		**Controller**		Director, Accounting, Payroll, and Student Attendance	
		1.00		**1.00**		1.00	
			Director III, Business Services		Director V, Business Services		Executive Director, Business Services
			1.00		1.00		1.00
		Director, Budget	Director II, Budget	**Director, Budget Development**		Director, Budget	
		1.00	1.00	**1.00**		1.00	
	Director, Grants and Funding			**Director, Program Accounting**			
	1.00			**1.00**			
	Assistant Director, Fiscal Services				Assistant Director, Business Services		
	1.00				1.00		
	Coordinator, Fiscal Services						
	1.00						
						Manager, Budget	
						1.00	

Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
		Manager, Accounting		**Manager, Central Office Accounting**		Manager, Accounting	Accounting Manager
		1.00		**1.00**		1.00	1.00
				Executive Leader Transitioning (Payroll)	Manager, Fiscal Services (Payroll)	Manager, Payroll	Payroll Operations Manager
				1.00	1.00	1.00	1.00
						Position Control and Financial Manager	
						1.00	
		Manager, Attendance and Audit					
		1.00					
	Supervisor, Accounts Payable	Supervisor, Accounting	Supervisor III, Accounting				Accounting Supervisor
	1.00	1.00	1.00				1.00
	Supervisor, Payroll	Supervisor, Payroll	Supervisor III, Payroll				
	1.00	1.00	1.00				
		Supervisor, Employee Service Center (Payroll)					
		1.00					

Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
				Senior Financial Analyst (Confidential Management)			Senior Payroll Analyst
				2.00			1.00
	Fiscal Analyst	Analyst II Accounting/Payroll		Financial Accountant III	Business Services Specialist (Budget)		Budget Analyst
	7.00	3.00		8.00	1.00		2.00
		Analyst II Fiscal Services		Financial Accountant II			
		3.00		1.00			
				Financial Accountant I			
				1.00			
		Analyst I Fiscal Services		Position Control Analyst			
		5.00		1.00			
	Benefits Technician (Confidential Management)						
	1.00						
	Payroll Technician						
	6.00						
Management FTE	**21.00**	**21.00**	**5.00**	**19.00**	**5.00**	**7.00**	**8.00**

Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Department Staff							
						Budget Technician (Confidential)	Budget Assistant (Confidential)
						3.00	3.00
		Accountant II (Payroll)					Payroll Analyst (Confidential)
		1.00					2.00
		Accountant I (Accounting)	Accountant		Accountant		Payroll Assistant (Confidential)
		11.65	5.00		5.00		2.00
		Accountant I (Payroll)	Accounting Specialist				
		2.00	1.00				
					Accounting Technician (Attendance)		Accounting Technician
					1.00		2.00
	ASB Bookkeeper						
	1.00						
					Budget Technician II	Categorical Budget Analyst	
					5.00	1.00	
						Budget Clerk	
						2.00	

Finance Division—Accounting, Accounts Payable, Budget, and Payroll						
Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
				Business Services Assistant	District Senior Attendance Specialist	
				1.00	1.00	
				Attendance Technician	District Attendance Specialist	
				1.00	2.00	
		Account Clerk IV				
		5.00				
			Accounts Payable Technician III		Account Technician	
			2.00		5.00	
Account Clerk II			**Accounts Payable Technician II**		Senior Account Clerk	Accounting Assistant II
6.00			**2.00**		2.00	6.00
Account Clerk I		Account Clerk I		Account Clerk I	Account Clerk	
2.00		1.00		5.00	1.00	
	Payroll Specialist			Lead Payroll Technician	Payroll Specialist	Senior Payroll Technician
	6.00			1.00	1.00	5.00
	Employee Service Center Specialist (Payroll)	Payroll Clerk Technician	**Payroll Technician II**	Payroll Technician	Payroll Technician	Payroll Technician
	3.00	5.00	**8.00**	6.00	7.00	1.00
					Payroll Clerk	
					1.00	

Finance Division—Accounting, Accounts Payable, Budget, and Payroll							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
			Account Clerk VI				
			1.00				
	Electronic Data Analyst		Position Control Specialist				
	1.00		1.00				
Department Staff	**10.00**	**23.65**	**19.00**	**12.00**	**25.00**	**26.00**	**21.00**
Clerical Staff							
	Executive Assistant	Administrative Secretary I (Confidential)	Administrative Assistant (Confidential)	**Office Manager II (Confidential Management)**	Executive Assistant II (Confidential)	Senior Executive Secretary (Confidential)	Executive Assistant III (Confidential)
	1.00	1.00	1.00	**1.00**	1.00	1.00	3.00
	Administrative Secretary	Department Office Manager	Secretary II			Executive Secretary (Confidential)	
	1.00	2.00	1.00			1.00	
	Intermediate Clerk Typist			**Receptionist**	Office Assistant II		
	2.00			**0.80**	1.00		
Clerical FTE	**4.00**	**3.00**	**2.00**	**1.80**	**2.00**	**2.00**	**3.00**
Total FTEs	**35.00**	**47.65**	**26.00**	**32.80**	**32.00**	**35.00**	**32.00**
Enrollment	**35,461**	**69,709**	**31,593**	**35,489**	**39,443**	**43,917**	**33,943**
Enrollment/FTE	**1,013.17**	**1,462.94**	**1,215.12**	**1,081.98**	**1,232.59**	**1,254.77**	**1,060.72**
Rank	**1**	**7**	**4**	**3**	**5**	**6**	**2**

Source: District-provided data

Finance Division—Procurement

The District's Finance Division has 4.00 FTE staff to support the District's procurement function. The comparative districts total staff FTE range from 6.00 FTE in Fontana USD to 17.00 FTE in Fresno USD. The enrollment-to-FTE ratio ranges from 4,100.53:1 in Fresno USD, representing the comparative district with the most staff relative to student enrollment, to 8,872.25:1 in the District. The District's ratio at 8,872.25:1 ranks last in the comparative group, indicating that the District has fewer staff relative to students enrolled than all of the comparative districts. The lower level of staffing is especially apparent for nonmanagement positions.

The District has fewer Purchasing Technicians and Buyer positions than the comparative districts. The District has 2.00 FTE Buyer positions, as compared to the other districts that range from 4.00 FTE of similar positions in Fontana USD to 13.00 FTE in Fresno USD. Of the Districts with similar enrollment, the average FTE for a technician or buyer position is 5.20 FTE, more than double the FTE found in the District.

The implications of the District's lower staffing found in the District's Procurement Department can have broad reaching impacts to the District. As discussed in a previous section of this report, we heard from staff that in most cases schools are operating in a decentralized purchasing model. While to some degree this could reduce the need for a largely staffed Procurement Department, critical functions must still be centralized from the department requiring adequate staff. District-wide purchasing procedures and guidelines must be developed and maintained, and the department must ensure compliance with purchasing, bid, and contract code requirements while working to mitigate future liability, all while buying at the best possible value (price over the lifetime of an asset or service). We also find that this is an instance of a direct service provided to schools that is likely impacted by the high number of schools found in the District. Each school will have purchasing needs and the centralized staff must support these functions. Because the District operates more schools, economies of scale are not present as found in the comparative districts with a similar enrollment level but half the schools. If the District is allowing schools autonomy in purchasing, by default there will be a higher number of individual purchases, and the potential for missing opportunities for bundling or high-volume discounts. This is an area we would recommend the District review further—in both District-wide purchasing functions/policies and Procurement Department staffing.

Figure 7: Finance Division—Procurement

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
				Finance Division—Procurement			
Management Staff		*Reports to the Deputy Superintendent of Administrative Services*		*Reports to Executive Director, Transportation & Logistics*		*Reports to the Deputy Superintendent of Administrative Services*	
	Director, Purchasing	Executive Director Purchasing	Director II, Purchasing	**Senior Manager, Supply Chain and Logistics (Procurement)**	Director III, Purchasing	Director, Purchasing and Stores	
	1.00	1.00	1.00	**1.00**	1.00	1.00	
	Senior Buyer	Purchasing Coordinator I				Manager, Purchasing	Purchasing Manager
	1.00	1.00				1.00	1.00
		Purchasing Business Operations Manager					
		1.00					
		Buyer III					
		2.00					
		Buyer II					
		4.00					
		Buyer I					
		1.00					
				Contract Analyst	Contract Analyst		
				1.00	1.00		
Management Staff	**2.00**	**10.00**	**1.00**	**2.00**	**2.00**	**2.00**	**1.00**

Finance Division—Procurement							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Department Staff							
	Buyer	Purchasing Technician	Purchasing Specialist	**Buyer**	Procurement Specialist	Senior Buyer	Senior Buyer
	1.00	6.00	1.00	**2.00**	6.00	1.00	1.00
			Purchasing Technician			Buyer	Buyer
			3.00			5.00	1.00
	Purchasing Clerk						Purchasing Technician
	2.00						4.00
							Property Control and Records Retention Technician
							1.00
						Storekeeper	
						1.00	
Department Staff	**3.00**	**6.00**	**4.00**	**2.00**	**6.00**	**7.00**	**7.00**
Clerical Staff							
	Purchasing Secretary	Department Office Supervisor	Secretary II		Administrative Secretary II		
	1.00	1.00	1.00		1.00		
			Clerk III				
			1.00				
Clerical FTE	**1.00**	**1.00**	**2.00**	**0.00**	**1.00**	**0.00**	**0.00**
Total FTEs	**6.00**	**17.00**	**7.00**	**4.00**	**9.00**	**9.00**	**8.00**

Finance Division—Procurement							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	5,910.17	4,100.53	4,513.29	8,872.25	4,382.56	4,879.67	4,242.88
Rank	6	1	4	7	3	5	2

Source: District-provided data

Finance Division—Risk Management

The District's Finance Division has 8.75 FTE staff to support the District's risk management function. The comparative districts total staff FTE range from 3.50 FTE in Fontana USD to 13.00 FTE in Fresno USD. The enrollment-to-FTE ratio ranges from 3,771.44:1 in Stockton USD, representing the comparative district with the most staff relative to student enrollment, to 10,131.71:1 in Fontana USD, representing the comparative district with the fewest staff relative to student enrollment. The District's ratio at 4,055.89:1 ranks 2 of 7 in the comparative group, indicating that the District has more staff relative to students enrolled than all but one of the comparative districts.

The District has a higher number of management positions relative to all department staff as compared to the other Districts, and with the exception of the 1.00 FTE Risk Management Assistant, does not have any other nonmanagement staff in the department. It should also be noted that the District employs some positions in the Risk Management Department not found in the comparative districts including a Staff Attorney and Law Clerk.

Figure 8: Finance Division—Risk Management

Finance Division—Risk Management							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Management Staff		*Reports to the Deputy Superintendent of Administrative Services*				*Reports to the Deputy Superintendent of Administrative Services*	
	Director, Risk Management	Executive Director, Benefits and Risk Management	Director III, Risk Management	**Risk Management Officer**	Director II, Risk Management	Executive Director, Risk Management	Director, Business Services
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00

Finance Division—Risk Management							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
		Manager II, Emergency Planning and Crisis Response	Risk Management Specialist	**Law Clerk III**			Risk Manager
		1.00	1.00	**0.50**			1.00
				Staff Attorney (Confidential)			
				0.25			
				Risk Management Administrator			
				1.00			
				Manager, Environmental Health and Safety			
				1.00			
				Manager, Fixed Assets and Insurance Solutions			
				1.00			
		District Supervisor I, Risk Management Claims		**Coordinator, Disability Management**			Coordinator, Disability Management
		1.00		**2.00**			1.00
							Coordinator, Benefits

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Finance Division—Risk Management							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
							1.00
	Claims Examiner (Confidential Management)	Analyst I, Workers Comp		**Financial Accountant III**			
	1.00	3.00		1.00			
Management FTE	**2.00**	**6.00**	**2.00**	**7.75**	**1.00**	**1.00**	**4.00**
Department Staff							
						Senior Claims Examiner (Confidential)	
						2.00	
							Benefits Analyst (Confidential)
							2.00
							Senior Insurance Technician (Confidential)
							3.00
			Account Clerk IV				
			1.00				
			Accounting Technician				
			1.00				
		Workers' Compensation Technician			Workers' Compensation Technician	Risk Management Technician	
		2.00			2.00	5.00	
					Safety Technician		

School Services of California INC.

Finance Division—Risk Management							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
					1.00		
		Disability and Retirement Technician			Benefits Specialist	Risk Management Benefits Specialist	
		3.00			1.00	1.00	
					Employee Benefits Assistant	Benefits Technician	
					2.00	1.00	
Department Staff	**0.00**	**5.00**	**2.00**	**0.00**	**6.00**	**9.00**	**5.00**
Clerical Staff							
	Senior Secretary II		Secretary II		Administrative Secretary II		
	1.00		1.00		1.00		
		Department Office Manager					
		1.00					
	Intermediate Clerk Typist	Office Assistant III		**Risk Management Assistant**			
	0.50	1.00		**1.00**			
Clerical FTE	**1.50**	**2.00**	**1.00**	**1.00**	**1.00**	**0.00**	**0.00**
Total FTEs	**3.50**	**13.00**	**5.00**	**8.75**	**8.00**	**10.00**	**9.00**
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	10,131.71	5,362.23	6,318.60	4,055.89	4,930.38	4,391.70	3,771.44
Rank	7	5	6	2	4	3	1

Source: District-provided data

Recommendations

1. **Review District-wide centralized processes originating in the Finance Division.** Staff reports that some processes, in practice, are decentralized which can have an impact on efficiency and even compliance with education code and other standards. Specifically, a review of the District's procurement processes is recommended to ensure District schools are complying with all purchasing and code requirements, and that the District is able to take advantage of purchasing economies of scale.

2. **Review classification of certain management positions.** In the Accounting, Accounts Payable, Budget, and Payroll Department as well as the Risk Management Department, the percentage of management staff relative to all other department staff is very high as compared to the similar district group. This practice could have implications for higher employee salary costs relative to other districts with fewer management positions, as well as an imbalance of technical versus supervisory support available to the Division. We recommend the District review the job duties for these positions to ensure they are classified appropriately.

3. **Consider augmenting the Procurement Department staffing.** The comparative analysis demonstrates that the District's procurement staffing is low overall, but specifically deficient in the number of the purchasing technician or buyer positions.

General Overview

During COVID-19, school district technology departments faced an immediate and unprecedented challenge of deploying resources to support distance learning. Anecdotally we know that most school district technology departments in the state were not optimized with adequate staffing, financial resources, hardware, software, and infrastructure. When the COVID-19 pandemic required an entirely new educational delivery model, it strained the already lean technology systems in school districts. Now that California schools have resumed in-person learning, technology demands have not waned as the need to support devices deployed during the pandemic continues. The challenge now moves from addressing the urgent needs of unexpected distance learning to developing a long-term strategic plan to effectively manage all of the new devices, hardware, software, and infrastructure investments. Ensuring adequate staffing in terms of the number and type of positions is critical to this effort.

Information technology resources are critical in ensuring that students are learning the skills they need, that management information is timely and accurate, and that staff members are working efficiently and effectively. School districts should include technology in strategic plans and shorter-term goal setting as the annual budget is developed. Transaction processing systems should be in place to ensure efficiency, management information systems should be robust and timely to provide pertinent information for decision-making, and procedures should be built around technology systems in order to ensure their appropriate use and the validity of data. Users should have pathways for requesting assistance and additional features with a clear priority scheme used to implement new technology. All of these functional elements should be supported by an organizational structure with well-defined and communicated reporting lines, assigned areas of responsibility, appropriate and reasonable manager span of control, and a clear career path and progression ladder to enhance the knowledge base and personal development of employees.

Even prior to the COVID-19 pandemic, the District experienced a very high demand in the service level required of the Information Technology Services Department (Department). The Department already had significant projects underway including replacing the wireless access points and routers in the District, changing service providers, and increasing the number of devices used by students and staff. These investments and the increased technology needs that emerged during distance learning in 2020–21, are expected to continue to require higher levels of staff support, and likely financial support to maintain the level of technology currently used by the District. How adeptly the Department can support and advance this work is directly related to the Department's staffing levels and organizational structure.

Organizational Structure and Staffing

The Department supports all District technology and related services including infrastructure, business applications, educational systems, systems integration, and technical support. The Department is led by the Chief Technology Officer (CTO) with the support of a 1.0 FTE Executive Director Technology Services. Twenty-four full-time staff report to the two managers: the CTO has 10 direct reports, including the Executive Director, and the Executive Director has 15 direct reports.

During interviews with staff, it was reported that the Department implemented staffing reductions over multiple years through 2019 that materially changed the organizational structure of the Department, reducing management positions and eliminating clerical support. As a result, many responsibilities previously assigned to these management and clerical positions now fall to the CTO and the Executive Director. This was a conscious decision by Department management to avoid reduction in direct-service positions which would have negatively impacted the delivery of services to students, schools, and other customers of the Department.

In 2018, the Department had three additional management positions—a Coordinator of Instructional Technology, Coordinator of School Data, and a Business Manager for the Department. Additionally, the Department had a full-time Administrative Assistant. In previous years, the Department had additional managers on the roster including a second Executive Director, additional 1.50 FTE Coordinators, and a Project Manager.

The organizational structure of any school district establishes the framework for the leadership of the district and the delegation of duties and responsibilities to major operational divisions. If well-designed and clearly defined, the organizational structure facilitates effective decision-making and efficient operations in support of student learning. Within the organizational structure lies a management hierarchy, which defines the level of responsibility and accountability given to managers. Generally, the management hierarchy consists of lower-level, mid-level, and upper-level managers. Lower-level managers are at the bottom of the managerial hierarchy and are generally seen as coordinators, or individuals responsible for implementing and monitoring programs and systems based on established procedures. They have limited decision-making authority and report to mid-level managers. Mid-level managers serve as intermediaries between lower-level managers and upper-level managers. These managers may still be involved in the day-to-day operations but have higher levels of responsibility and accountability. They are generally responsible for establishing systems, creating procedures, allocating resources, and keeping things going in the right direction based on the direction set by upper-level managers. Upper-level managers are the top executives in a company and in the school context can be members of the superintendent's cabinet. Upper-level managers are

leading major divisions, or departments within a division, and are setting the direction to ensure achievement of district goals and implementation of district initiatives

Given the previous explanation of staffing, the result is that the Department currently has a flat organizational structure with only one level of management—absent are lower-level and mid-level managers. The Department's two managers—the CTO and Executive Director—directly supervise and evaluate all department staff. In this structure, the managers' span of control may be challenging because of the previous staff reductions and workload the two managers have absorbed. Span of control refers to the number of subordinates reporting directly to a supervisor. Although there is no agreed-upon ideal number of subordinates for span of control, it is generally agreed that the span can be larger at lower levels of an organization than at higher levels, because subordinates at lower levels typically perform more routine duties and can therefore be supervised more easily.[1] As the division of labor is spread from top managers to line managers, those line managers can then supervise more people as the functions of the subordinate positions are more similar and routine in nature.

In a flat organizational structure, managers are often less available to provide direct supervision and direction due to the sheer number of employees supervised and the broad set of functions assigned. Upper-level managers such as the CTO and Executive Director should be leading major divisions, or departments within a division, and setting the direction to ensure achievement of district goals and implementation of district initiatives. As a result of the CTO and Executive Director's current span of control, employees must be more self-reliant, and the existence of current department and operational policies and procedures becomes even more critical as employees must rely on support from those sources versus direct management guidance. Though the organizational structure of the Department is flat, it is important to note that this occurred as the result of budget reductions that necessitated corresponding staff reductions eliminating additional management positions, not because of an intentional change to the structure to improve operations or efficiencies. As a result, with only two management positions, high-level decision making, and management functions are centralized to just two individuals—the CTO and Executive Director. With 24 staff in the Department (excluding the two managers), this flat, highly centralized decision-making structure is likely to put significant stress and strain on the Department staff, customers of the Department, and managers.

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[1] Principles of School Business Management, Association of School Business Officials, Incorporated, Wood, R. Craig, Thompson, David C., Picus, Lawrence, O., Tharpe, Don I., 2nd Edition (1995).

When evaluating the span of control for a manager in an organization, there is no one-size fits all approach. Understanding the role of the manager and aspects of the organization can provide context to the appropriate span of control range, including:

- Allocation of time: Is the manager also an individual contributor, or do they solely manage staff?

- Processes/procedures: Do well-developed and standardized processes and procedures exist that have been implemented organization-wide?

- Work type: Is the work standardized or unique? How similar or different is the work of staff?

- Experience and skills: Are direct reports independent in their work? How much training and direct supervision must be provided?

Both the CTO and Executive Director positions function as individual contributors in addition to managing staff. Both positions are also responsible for strategic planning for technology services to support the entire District, project management, and performing day-to-day operational tasks that are not typically assigned to a leadership/manager position including ordering devices, approving purchases and payments, preparing board reports, reviewing service contracts, and entering and approving employee leave. Strategy work requires a great deal of experience and industry expertise as the work is unique and generally not repeatable. When reviewing the Department staffing, though certain functions can be grouped together, the work generally requires a high level of technical expertise that is gained by hands-on training once employed by the District. Some of the work may be standardized to a degree, but the nature of technology services is such that navigating unpredictability and problem solving are required.

Given existing staffing levels, department staff also reported significant challenges in providing adequate support to schools. We would be remiss to not address the challenges that emerge from supporting the number of schools found in the District (81 schools) versus the number of schools found in districts of comparable enrollment size (an average of 49 schools). Specifically for the technology operations and provision of service, the number of schools supported has a direct effect on the level of service provided and the staffing needed to support such services. While the number of student devices supported may be similar if comparing to a school district with enrollment similar to the District, a district with a higher number of schools will require more infrastructure support (networks, wireless access points, classroom technology, etc.) and potentially more teaching and support personnel devices to maintain. An analysis of each districts' staffing compared to the number of schools served will also be provided.

The District's Department staffing will be compared to five districts of comparable enrollment size (Fontana USD, Moreno Valley USD, Riverside USD, Santa Ana USD, and Stockton USD) and one district with enrollment double the District's, but a more similar number of schools (Fresno USD). Figure 9 provides the enrollment and number of schools for each of the comparable districts, and the District.

Figure 9: Information Technology Services—Number of Schools, 2020-21

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Number of Schools	45	100	39	**81**	47	54	56

Source: CDE, DataQuest 2020-21

In addition to the 81 schools, the District also operates a robust child development program, with 15 standalone child development centers that are also supported by the Information Technology Services Department. The Department also provides services to the District's central office departments which are located at seven different physical locations. Though not part of the comparative analysis, consideration should be given to the levels of support (time, staff, and budgetary) required of the Department to the 15 child development centers and seven physical locations for central office departments in addition to the 81 schools.

Overall Department Staffing

The District's Information Technology Services Department has 26.00 FTE staff to support the District's technology functions. The comparative districts total staff FTE range from 28.00 FTE in Stockton USD to 93.00 FTE in Fresno USD. The enrollment-to-FTE ratio ranges from 656.69:1 in Fontana USD, representing the comparative district with the most staff relative to student enrollment, to 1,514.38:1 in Santa Ana USD, representing the comparative district with the fewest staff relative to student enrollment. The District's ratio at 1,364.96:1 ranks 6 of 7 in the comparative group, indicating that the District has fewer staff relative to students enrolled than all but one of the comparative districts.

Please note that SSC requested that the comparative districts provide staffing data on all technology positions that provide support in each district. Despite this, it is possible that the comparative districts may have certain school-based positions that are not reflected in

the following figures. As a result, the District's staffing level in the Information Technology Services Department may be more deficient, comparatively, than the data shows.

Figure 10: Information Technology Services—Overall Staffing

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	54.00	93.00	33.00	**26.00**	44.00	29.00	28.00
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Enrollment/FTE	**656.69**	**749.56**	**957.36**	**1,364.96**	**896.43**	**1,514.38**	**1,212.25**
Rank	1	2	4	**6**	3	7	5
Number of Schools	45	100	39	**81**	47	54	56

Management Staffing

At the management level, the District ranks the lowest (commensurate with Santa Ana USD) in the comparative group at 2.00 FTEs indicating that it employs fewer management-level positions than most of the group—ranging from 3.00 FTE in Stockton USD and 17.00 FTE in Fresno USD. The average manager FTE in the comparative group is 8.00 FTE. When examining the five similar-enrollment comparative districts, the average manager FTE is 6.00 FTE. The enrollment-to-FTE ratio ranges from 3,286.92:1 in Riverside USD to 21,958.50:1 in Santa Ana USD. The District's enrollment-to-FTE ratio of 17,744.50:1 ranks 6 of 7. Figure 11 summarizes the total management FTE.

Figure 11: Information Technology Services—Management Staffing Summary

	Fontana USD (10/1/2020)	Fresno USD (4/19/2021)	Moreno Valley USD (10/1/2020)	Oakland USD (10/1/2020)	Riverside USD (5/1/2021)	Santa Ana USD (4/16/2021)	Stockton USD (10/23/2020)
Total FTEs	7.00	17.00	6.00	**2.00**	12.00	2.00	3.00
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Enrollment/FTE	5,065.86	4,100.53	5,265.50	**17,744.50**	3,286.92	21,958.50	11,314.33
Rank	3	2	4	**6**	1	7	5
Number of Schools	45	100	39	**81**	47	54	56

When examining the percentage of management staff relative to all other technology staff, the District has the second lowest percentage of management staff at 8%, just behind Santa Ana USD at 7%.

Figure 12: Information Technology Services—Percentage of Management Staff

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Management FTEs	7.00	17.00	6.00	**2.00**	12.00	2.00	3.00
Total FTEs	54.00	93.00	33.00	**26.00**	44.00	29.00	28.00
Percentage Management FTE	13%	18%	18%	**8%**	27%	7%	11%

In examining the management job classifications found in the comparative districts, absent in the District is the support of the second tier of management (lower-level and mid-level managers): directors, coordinators, managers, and supervisors. By establishing a secondary management tier, technical staff can directly report to these positions, organizing the reporting line by function or service (i.e., instructional technology; school-level support services; network management and engineering; etc.) to streamline provision of training, supervision and work assignment, and evaluation. A supervisor-level position can be beneficial in creating more effective and efficient operations in that these positions can be responsible for implementing and monitoring programs and systems based on established procedures and can also be a hands-on manager to provide technical support as needed. Additionally, the span of control of

managers can be larger when staff supervised perform similar, repeatable work. Figure 13 provides the detailed management staffing for the District and the comparative districts.

Figure 13: Information Technology Services—Detailed Management Staffing

Information Technology Services—Total Management Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Management Staff			*Reports to Business Services*			*Reports to the Deputy Superintendent, Administrative Services*	
	Chief Technology and Innovation Officer	Chief Technology Officer	Executive Director, Technology, Innovation, and Assessment	**Chief Technology Officer**	Director, Innovative Learner Engagement and Technology Services	Director, Technology Innovation Services	Chief Technology Officer
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00
		Executive Officer, Enterprise Infrastructure and Services		**Executive Director, Technology**			
		1.00		**1.00**			
		Executive Director, Enterprise Applications					
		1.00					

Information Technology Services—Total Management Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
	Director, Online Education	Director, Learning Support					
	1.00	1.00					
						Assistant Director, Technology Innovation Services (Information Technology)	
						1.00	
	Coordinator, Computer Services	Coordinator II, STEM and ATLAS Support	Coordinator, Accountability		Coordinator, Digital Learning Initiatives		
	1.00	1.00	2.00		1.00		
	Coordinator, Network Communications	Coordinator II, Learner Support	School Information Systems Administrator				
	1.00	1.00	2.00				
	Coordinator, Online Education	Coordinator II, IT Security and Privacy					
	1.00	1.00					
		Manager II, Enterprise Services and Core Infrastructure	Network Manager		Manager of Systems		Technology Manager

Information Technology Services—Total Management Staffing						
Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
	1.00	1.00		1.00		1.00
	Manager I, Learner Support			Manager, Instructional Technology		
	2.00			1.00		
	Manager II, Network/ Telecomm			Manager, Computer Applications		
	1.00			1.00		
	Manager II, Enterprise Systems			Manager, Network/ Computer Services		
	1.00			1.00		
Supervisor, Information Technology Customer Service	Manager II, ATLAS Student Information System			Supervisor, Instructional Technology		Network Supervisor
1.00	1.00			1.00		1.00
	Project Manager, Student Records			Technology Services Supervisor		
	1.00			1.00		
Information Security Specialist				Network Specialist		
1.00				3.00		

Information Technology Services—Total Management Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
		Analyst II			Specialist, Instructional Services-Innovation		
		2.00			1.00		
		Analyst I					
		1.00					
Total FTEs	**7.00**	**17.00**	**6.00**	**2.00**	**12.00**	**2.00**	**3.00**
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	5,065.86	4,100.53	5,265.50	17,744.50	3,286.92	21,958.50	11,314.33
Number of Schools	45	100	39	81	47	54	56
Rank	3	2	4	6	1	7	5

Source: District-provided data

Technical Department Staffing

For technical/staff positions, the District has the second lowest total FTE at 24.00 (commensurate with Stockton USD). Fresno USD reported the highest FTE at 74.00 FTE, and Moreno Valley USD reported the lowest staffing at 23.00 FTE. The average technical/staff FTE in the comparative group is 37.00 FTE. When examining the five similar-enrollment comparative districts, the average manager FTE is 30.00 FTE. The enrollment-to-FTE ratio ranges from 788.02:1 in Fontana USD to 1,689.12:1 in Santa Ana USD. The District's enrollment-to-FTE ratio of 1,478.71:1 ranks 6 of 7. The District's technical/staff FTE is significantly lower than the comparative group averages, likely impacting the District's ability to provide needed services. Figure 14 summarizes the total technical staff FTE.

Figure 14: Information Technology Services—Technical Staffing Summary

Information Technology Services—Technical Staffing Summary							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	45.00	74.00	23.00	**24**.00	29.00	26.00	24.00
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Enrollment/FTE	788.02	942.01	1,373.61	**1,478.71**	1,360.10	1,689.12	1,414.29
Rank	1	2	4	**6**	3	7	5
Number of Schools	45	100	39	**81**	47	54	56

In examining the technical staff job classifications found in the comparative districts, the Districts staffing for user support positions (school-level technology support, help desk, and other end user devices) appears to be lower than staffing levels for similar functions found in the comparative districts. While network administrator staffing in found in the District appears to be comparable, network analyst or technician-level staffing appears to be lower and could indicate that the administrator-level positions have absorbed additional duties as the Department experienced staffing reductions. Absent from the District's staffing are positions to support instructional technology and related staff development. Figure 15 provides the detailed technical staffing for the District and the comparative districts.

Figure 15: Information Technology Services—Detailed Technical Staffing

Information Technology Services—Technical Staffing							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Technical Department Staff							
Engineer/Database/ Programmer Designation		Systems Engineer	Systems Administrator				Systems Administrator
		4.00	2.00				2.00
	Database Administrator	Database Administrator		**Database Administrator**		Database Engineer	Database Administrator
	1.00	2.00		**1.00**		2.00	2.00
	Junior Database Administrator					Database Technician	Database Applications Analyst
	1.00					1.00	4.00
		Software Engineer		**Software Developer IV**	Software Engineer	Software Engineer	
		3.00		**1.00**	2.00	1.00	
		Software Developer III		**Software Developer II**			
		3.00		**1.00**			

Information Technology Services—Technical Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Engineer/Database/ Programmer Designation *Cont.*		Software Developer II				Web Infrastructure Systems Administrator	
		4.00				1.00	
		Software Developer I				Programmer Analyst	
		1.00				4.00	
Network Designation	Senior Local Area Network Analyst			**Senior Network Engineer**		Network Engineer	Network Administrator
	2.00			**1.00**		1.00	2.00
	Local Area Network Analyst	Network Technician II		**Senior Network Administrator**		Senior Network Analyst	Lead Computer Networking Support Technician
	17.00	3.00		**2.00**		2.00	1.00
	Network Operations Center Technician			**Network Administrator I**		Network Technician	Network Support Technician
	1.00			**2.00**		5.00	9.00
	Network Systems Analyst			**Network Infrastructure Specialist**			
	8.00			**1.00**			

Information Technology Services—Technical Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Technical Support Designation				**Senior Computer Operator**			Computer Operator
				1.00			2.00
		Information Systems Specialist		**Student Information Specialist III**			
		1.00		**3.00**			
		Student Records Technician	Data Reporting Technician	**Information Systems Specialists II**		Application Support Operations Analyst	Software Support/ Data Processing Technician
		2.00	1.00	**2.00**		1.00	2.00
		Systems Technician II		**End User Support Specialist II**			
		2.00		**1.00**			
	Instructional Technology Specialist II				Instructional Technology Technician		
	6.00				1.00		
	Instructional Technology Specialist I				Lead Library/ Media Assistant		
	4.00				1.00		
		Technology Support Specialist III	IT Analyst III	**Senior Computer Technician**	Help Desk Analyst III		
		4.00	4.00	**2.00**	2.00		

Information Technology Services—Technical Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Technical Support Designation *Cont.*		Technology Support Specialist II	IT Analyst II	**School Technology Specialist**	Help Desk Analyst II		
		9.00	15.00	**6.00**	4.00		
		Technology Support Specialist I			Help Desk Analyst I	Help Desk Analyst	
		22.00			10.00	2.00	
	Help Desk Support Specialist	Customer Service Representative			Help Desk Assistant	Help Desk Technician	
	3.00	7.00			1.00	2.00	
	Telecommunications Specialist	Program Technician	Technology, Innovation, and Assessment Assistant		Data Quality Technician	Business Analyst II	
	2.00	3.00	1.00		4.00	3.00	
		Web Administrator				Business Analyst I	
		1.00				1.00	
					Staff Development Specialist		
					3.00		
		Teacher on Special Assignment			Teacher on Special Assignment		
		3.00			1.00		

Information Technology Services—Technical Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	45.00	74.00	23.00	24.00	29.00	26.00	24.00
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	788.02	942.01	1,373.61	1,478.71	1,360.10	1,689.12	1,414.29
Number of Schools	45	100	39	81	47	54	56
Rank	1	2	4	6	3	7	5

Source: District-provided data

Clerical Staffing

At the clerical support staff level, Moreno Valley USD ranks the highest at 4.00 FTE, while Santa Ana USD and Stockton USD rank the lowest at 1.00 FTE. The District is the only district within the group that does not employ clerical positions. The enrollment-to-FTE ratio ranges from 7,898.25:1 in Moreno Valley USD to 43,917.00:1 in Santa Ana USD. Figure 16 provides the summarized clerical staffing for the District and the comparative districts.

Figure 16: Information Technology Services—Clerical Staffing Summary

Information Technology Services—Clerical Staffing Summary							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	2.00	2.00	4.00	0.00	3.00	1.00	1.00
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	17,730.50	34,854.50	7,898.25	N/A	13,147.67	43,917.00	33,943.00
Number of Schools	45	100	39	81	47	54	56
Rank	3	5	1	N/A	2	6	4

All of the comparative districts have clerical staffing—primarily in the form of a secretary position to provide clerical and administrative support to the technology departments. The average clerical FTE for the comparative group is just over 2.00. The absence of any clerical support in the District is unique, and as recently as 2018, an administrative assistant position supported the Department. This position was eliminated as a result of budget reductions to the Department. With an already lean staffing as compared to the other Districts, the absence of clerical support is likely to be felt acutely in the District's Information Technology Services Department. The CTO and Executive Director reported absorbing many of the duties of former clerical positions. Figure 17 provides the detailed clerical staffing for the District and the comparative districts.

Figure 17: Information Technology Services—Detailed Clerical Staffing

Information Technology Services—Clerical Staffing							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Clerical Staff							
	Administrative Secretary	Administrative Secretary III	Secretary III		Administrative Secretary II	Administrative Secretary	Senior Administrative Assistant
	1.00	1.00	2.00		1.00	1.00	1.00
	Intermediate Secretary	Department Office Manager	Secretary II		Administrative Secretary I		
	1.00	1.00	1.00		1.00		
			Data Clerk III		Office Assistant III		
			1.00		1.00		
Total FTEs	**2.00**	**2.00**	**4.00**	**0.00**	**3.00**	**1.00**	**1.00**
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	17,730.50	34,854.50	7,898.25	N/A	13,147.67	43,917.00	33,943.00
Number of Schools	45	100	39	81	47	54	56
Rank	3	5	1	N/A	2	6	4

Source: District-provided data

Staffing and School Analysis

While the staffing data provided in the previous tables demonstrates that the District's staffing measured on a pure FTE basis, or even an enrollment-to-FTE ratio, is lower than found in the comparative districts, it is also critical that any evaluation of technology staffing also include analysis of the number of schools supported by a technology department. Though the District's enrollment is similar to five of the comparative districts (Fontana USD, Moreno Valley USD, Riverside USD, Santa Ana USD, and Stockton USD), the number of schools supported by the District's Information Technology Services Department is between one and a half and two times the number of schools reported in those comparative districts. For the similarly sized comparative districts, the average number of schools is 49 compared to 81 in the District. When compared to Fresno USD with enrollment almost double the District at 69,709 and 100 schools, the District has just 19 fewer schools.

Technology functions are deployed to and supported at schools across a school district including implementing and maintaining infrastructure (including wireless networks), providing hands-on technical support, and device and network set up. If, as in the District, technicians who support schools are assigned to more than one school, this must be considered as a factor affecting the level of support provided to a school if a technician is not "on-site" every day. The District reported that technicians providing school support may have up to 15 assigned schools, which limits the level of service that can be provided. Because of this, staffing must be viewed through the lens of enrollment *and* the number of schools supported. One would expect to see the level of staffing increase to support a larger number of schools.

The ratio of FTE support for schools was calculated in figure 18. It should be noted that the entire technology department staffing was included in the calculation to demonstrate the overall department staff support available to schools, with the understanding that not all of the department staffing will provide direct school support, but the departments provide staffing at some level to the entire district operation. The District's staffing supports only 0.32 FTE to support each of the 81 schools, the lowest level of support found in the comparative group. For the remaining districts, the level of staffing to support each school ranges from 0.50 FTE in Stockton USD to 1.20 FTE in Fontana USD. Without adequate staffing, staff may not be able to provide the required services and support.

Figure 18: Information Technology Services—Staffing FTE per School

Information Technology Services							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Total FTEs	54.00	93.00	33.00	**26.00**	44.00	29.00	28.00
Number of Schools	45	100	39	**81**	47	54	56
FTE per School	1.20	0.93	0.85	**0.32**	0.94	0.54	0.50
Rank	1	4	5	**7**	2	5	6

Recommendations

4. **Reorganize the Department according to the functions performed by the job classifications.** Technology departments can be broadly organized into three functions: Instructional Technology, Network and Infrastructure, and Student and Data Systems.

   a. Consider adding additional supervisory positions to oversee functional areas including technical end-user support, network/communications, instructional/educational technology, etc. Structuring the Department in this manner with the purpose of aligning functions with similar responsibilities and dependencies should allow for a more appropriate span of control for each supervisory or management position and enhance the standardization of support, communications, and improve service levels. In this model, the span of control for lower-level and mid-level managers can be larger because the functions and positions supervised are more similar and can be standardized.

5. **Examine staffing at all levels and determine if augmentations can be made.** Overall, the Department's staffing is far below the levels found in the comparative districts. Interviews and review of staffing data over time demonstrate the reduction in management and clerical positions which has shifted most clerical work to the CTO and Executive Director, as well as the manager functions from the eliminated positions. Providing adequate staffing levels is crucial to support the current and future technology needs of the District. In addition to the recommendation to reorganize the Department and add supervisory positions, we recommend the following:

   a. Assess technical staffing levels that provide schools-level support. It is recommended that at a minimum, an assessment of school-level support staff be identified in order to provide further oversight and support for the delivery of technology services. The low ratio of FTE support per school indicates that no school has a dedicated technology staff member, and with large numbers of schools assigned to each technician, providing an adequate level of support will be challenging. It is common for larger schools to have a full-time technician assigned for support, augmented by other position supports as needed. Currently, school-level technicians are reported to have anywhere from 12 to 15 assigned schools, which if a regular schedule is established of visiting two schools a day (excluding any technology emergencies that might require a change in the schedule), technicians are able to visit a school every 1.5 to 2 weeks. We would recommend at a minimum, that roving technicians are assigned no more than five schools to allow for a at least a weekly visit, also providing time to address emergencies. The level of technical support required is largely dependent on the District's technology initiatives, devices supported, and instructional technology needs. Based upon the District's specific needs, a higher level of school-level technicians may be needed.

   b. Examine if existing school personnel job duties can be augmented to include targeted technology support for schools in order to address lower-level technology needs on days the assigned technician is not present. In some districts, this support is performed by with highly technical library median technicians and teachers on special assignment. These positions are based at the schools and can support immediate technology needs such as when classroom devices or technology are down and impacting teaching and learning time.

   c. Reestablish clerical support positions for the Department. For a district of Oakland USD's size, having clerical support for the two senior management positions is necessary to allow proper assignment of functions, removing the clerical functions from the CTO and Executive Director. Functions for a clerical support position should include:

      i.   General administrative support including: Provision of secretarial assistance to the CTO and Executive Director, and other staff as assigned; maintains appointment calendar; schedules meetings. Compilation of data for and prepares reports and lists. Preparation of correspondence, forms, memoranda, and reports from handwritten drafts or dictation; duplication of materials.

     ii.   Preparation of Board reports and agenda items

    iii.   Posting of employee leaves

    iv.   Maintaining staff absence and timesheet records to submit to the payroll office

     v.   Preparation of purchase orders and participates in match and approval process for purchases and receipt of goods

    vi.   Supporting department budget functions including preparing budget reports and summaries for the Department management

6. **Evaluate the District's technology procedures and standards.** The District should consider establishing a more centralized technology selection process—for software applications, hardware, and other components—and include staff participation in that process. This approach will reduce the risk of a technology being selected and implemented that does not meet end-user requirements, or the selection of a technology for which the District may not have the capacity or expertise to support—both outcomes can be costly to the District in terms of inefficiency and reduced morale when Department staff are unable to provide the desired high-level of service. The reciprocal element of this recommendation is that the Department needs the support from District leadership in establishing the expectation that all District staff and schools will follow the established selection process and standards. Below is a high-level outline of what a technology process should incorporate:

- Identify/verify technology need

- Identify key stakeholders of technology

- Gather requirements from stakeholders

- Create a short list of leading vendors in the technology area

- Create a matrix of features, costs, support requirement, life cycle, etc.

- Incorporate outside opinions from Gartner, InfoWorld, peers, other districts, stakeholders, etc.

- Weigh each of these metrics according to their relative importance to the District

- Consider having a "bake off" of leading solutions and incorporate input from stakeholders

- Select technology that offers "best value" to the District through careful return on investment analysis

- Post implementation—validate whether project goals were met, and if not, identify gaps and adjust process as needed

Background Factors

Review of documentation submitted during virtual fieldwork and interviews with department staff indicate that, as the result of recent reorganization processes and elimination of other departments and services, some functions have been reassigned to the Talent Division (Division). This has resulted in the migration of essential functions to the Division previously assigned to other departments or divisions. In addition, though the services and functions have been assigned to the Division, we did not find a corresponding increase in division staffing to accommodate the additional workload brought on by the increase in duties performed in the Division. This background is included in the analysis of the Division as it is noted by staff as significantly impacting the workload of the Division and influences the District's ability to make staffing adjustments within the Division.

Interviewees indicate that during a previous reorganization, the Organizational Effectiveness Department was eliminated. The function of this department was to improve the culture within the District and align the priorities with the talent (staff) within the District. After elimination of the Organizational Effectiveness Department, functions such as professional training for managers and classified staff were reassigned to the Talent Division. In addition, the Division and staff provide support for functions related to staff wellness, leadership growth and development, and teacher development. Information collected during interviews indicates that these departments were either eliminated during previous reorganizations, or the positions in other departments handling the functions were eliminated and the services were reassigned to the Division. In addition, the management of health and welfare benefits, which is commonly a shared responsibility between human resources and business services, was previously assigned to risk management in the Finance Division and was transferred to the Talent Division. There are currently 2.00 FTE positions supporting benefits in the Division, which staff indicate is functioning adequately, but any adjustments to staffing in terms of reductions will result in significant impacts to the District being able to support this critical function.

Another factor which influences staffing needs and workload from Division staff perspective, is the unique circumstances found in the Oakland community. These circumstances are intertwined with the District's initiatives and contribute to the development of needed District services. Interviews with staff indicate that the District is an integral part of the community, and the community is deeply integrated into the District. Due to the unique challenges and experiences within the community, current events and movements related to social justice and other important topics drive staffing needs in certain service areas, in addition to the needs of students. The external influences are also reflected in the District's ability to retain staff. Due to the exceptional, and significant challenges of the student

population in the District, there is a greater need for specialized positions which provide multilingual services, mental health services, health clinics at schools, and community school management. In addition, the need for comprehensive support to serve special student populations such as homeless and youth services, and to address the District's initiatives to focus on mental health services is greater.

The increased need for positions in hard-to-fill areas results in increased recruitment workload. To assess Division workload related to recruitment, hiring and attrition data was examined as part of the analysis. Review of the data submitted in figure 19, indicates that the Division averaged approximately 932 new hire and rehire transactions over the last three school years. It is noted that the 2020–21 school year was not complete when the data was submitted. Due to the hiring pace of 2020-21, it is estimated that the final number of recruitment transaction was greater than 691 transactions illustrated in figure 19. This data is included as the District's focus on recruitment and retention is the essential objective of the Talent Division, resulting in significant workload impacts required to support this function.

Figure 19: New Hire and Rehire Data

	2018–19	2019–20	2020–21
New Hires	982	780	581
Rehires	167	178	110
Total	**1,149**	**958**	**691**

Source: District recruitment data
Note: 2020–21 data as of time of fieldwork (May 2021)

In addition to workload impacts of recruitment, hiring new employees influences the induction and staff development needs of the District. Due to the large number of new employees hired on an annual basis, the Talent Division is under constant strain to provide onboarding, induction, and training services to ensure that the District's educator and classified workforce is appropriately trained and qualified. Interviews with staff indicate that due to the teacher shortage, and the acute staffing needs within the District, the recruitment and retention program must go beyond a focus on process to integrate strategic efforts. The mindset within the Division cultivates a culture to grow the teacher workforce to address the challenge of staffing classrooms with fully qualified teachers. This includes what staff termed "wrap around" services to help provide opportunities for teacher candidates to earn credentials.

As part of the ongoing efforts to improve teacher retention, interviews with staff indicate that the District has established an internal induction program with Division staff assigned to support the function. Interviewees also note that the District has implemented an in-

house credentialing program initiative to help diminish the number of teachers working on emergency credentials. As this plan moves forward, staff note that the additional program support will require a review of existing Division staffing. Teacher induction is critical to the District's ability to retain teachers; however, it is noted induction is typically a shared responsibility between educational services and human resources. Though Division staff value the responsibility of teacher induction and development, and express pride in the work they have done in this area, it is also recognized that staff assigned to this function are typically assigned to educational services. This is identified as an area which requires further assessment by the District, and one that, with current limited staffing, would struggle should staffing levels be reduced within the Division.

During virtual fieldwork it was communicated that there is a sense that the Division is overwhelmed with the workload and any adjustments to reduce staffing would cause acute hardship in the District's ability to operate. However, interviewees do not attribute this concern entirely to workload and transactional duties, but to the absence of effective systems and inequities in the distribution of work. In addition, staff indicate that they often field questions from employees that don't fall within their assigned area. This is attributed to some of the job titles found within the Division as they are confusing and do not effectively communicate the roles and responsibilities of the positions.

SSC observed that the name of the Division and some of the positions within the Division are uniquely named and titled, and therefore required an additional level of analysis. After review of the job duties assigned, it is determined that the job titles alone, not the work performed, are unique to the District, as the assigned functions to each position for human resources (HR)-related tasks aligned within the comparative group. This is noted in this analysis to distinguish that the Division name and job titles create a level of confusion as they do not accurately reflect the work performed.

Organizational Structure and Function

The Talent Division is responsible for a wide scope of functions, and the organizational structure reflects a separation of services within the department. Oversight of general HR functions such as all areas of employee management, including compensation, employee leave, substitute management, recruitment and retention, and other operational functions related to HR matters are all handled by the Division. In addition, the Division oversees all aspects of employee benefits, teacher and leader growth and development, and new teacher induction and peer assistance. The functional areas of employee benefits are commonly shared with the fiscal services department while teacher growth and development, and induction are shared with educational services. However, the department structure in the District includes these functions as areas of oversight by the Talent Division as reflected in figure 20.

Figure 20: Talent Division Organizational Chart, 2021
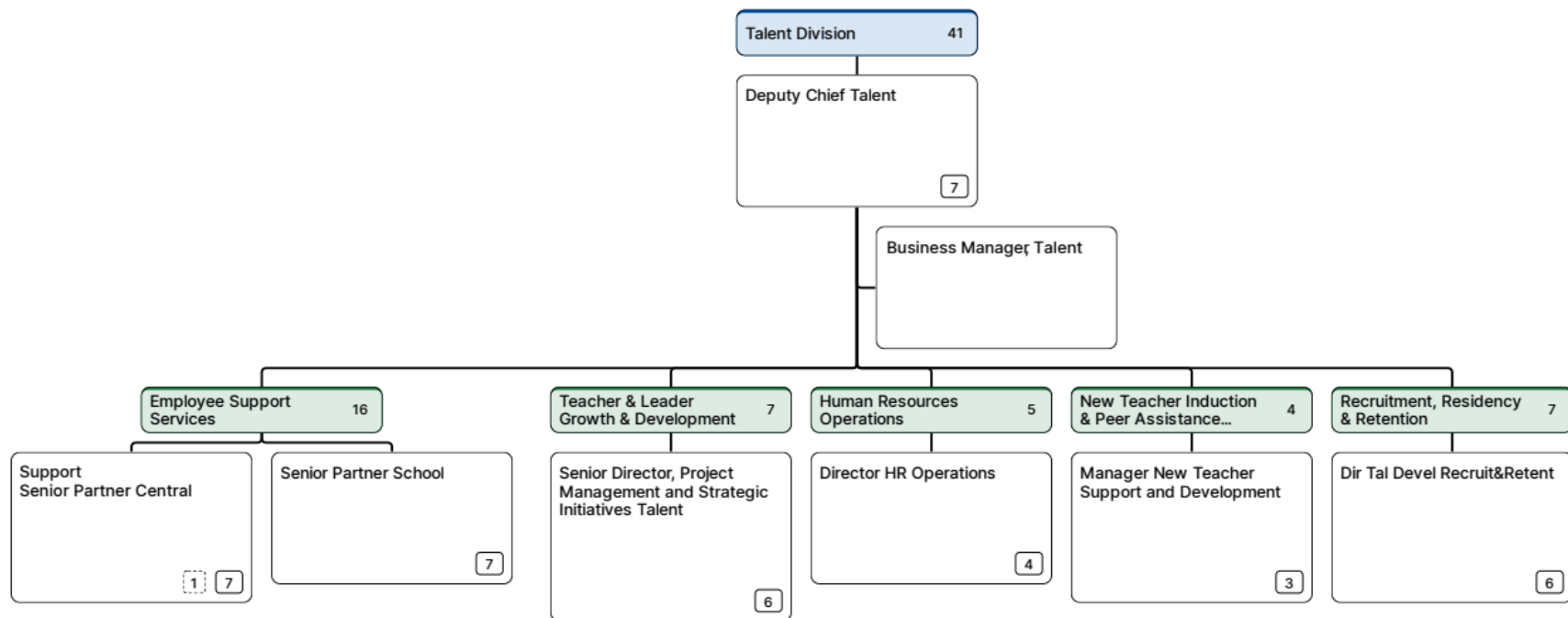
Note: The organizational chart in Figure 20 was provided by the District and shows the former title for the Chief Talent Officer as Deputy Chief Talent. The position title was changed in 2019 to reflect Chief Talent Officer. The organizational chart has not yet been updated but was used in this report as a source document from the District. The correct title of Chief Talent Officer is used in this report.

Review of the comparative group organizational charts for the HR departments indicates that the District is the only district in the group that includes the areas of professional development and teacher induction as a function within the Division. In addition, Santa Ana USD provides a Classified Professional Development Department, which includes a director position with two training specialists. The Classified Professional Development Department is similar to the District's Organizational Effectiveness Department, which was eliminated. This detail is of note as interviews with Talent Division staff indicated the Organizational Effectiveness Department was eliminated a few years ago, and the duties were absorbed within the Division. The additional responsibility impacts staffing needs and workload and reflects the trend of elimination of staff and services, then transferring the duties to the Division. In review of Santa Ana USD's organizational chart, the Classified Professional Development Department is not illustrated as part of the HR Department, so HR does not staff to support the function in that comparative district.

Oversight of the Talent Division is addressed through a multilevel supervisory model. The services within the Division are divided into their respective areas with each area assigned a partner or director with supervision responsibilities. In review of the positions and organizational chart, the current structure reflects a model of departments within a department, in that each functional area has its own reporting line. While it is recognized that the functions related to teacher development, training, and induction should include their own reporting structures because they are not related to essential HR functions, the other areas involved with HR operations, recruitment and retention, and employee management support do not reflect an overlap of responsibility. This structure creates difficulty in the District's ability to support cross training and create capacity within the department.

Staffing Analysis

The analysis of staffing levels in the Talent Division is based on SSC's review of position control reports, the Division's organizational chart, and virtual interviews with key staff members. Position control is a dynamic, reflecting staffing changes from day-to-day. The report reviewed for purposes of this analysis was retrieved at the time of SSC's field work and staffing may have changed since the analysis was completed. It is further noted that the position control report included position vacancies as illustrated in figure 21.

Figure 21: Talent Division—Vacant Positions

Position	Vacant FTE
School Partner	1.0
Manager, Leader Growth	1.0
Assistant Staffing Support	1.0
Specialist, Educator Effectiveness	1.0

Source: District Position Control

These positions may have been filled since the time of fieldwork, nevertheless since they are in position control, they are illustrated in the staffing tables as vacant positions. Should the District move forward with elimination of these positions and services, it is recommended that the positions be removed from position control records in order to maintain accurate fiscal records.

The Talent Division has 43.80 FTE staff to support HR management and operations, teacher and classified staff professional development, and teacher induction functions. The comparative districts range from 27.00 FTE in Fontana USD and Riverside USD to 55.00 FTE in Moreno Valley USD. The enrollment-to-FTE ratio ranges from 574.42:1 in Moreno Valley USD, representing the comparative district with the most staff relative to student enrollment, to 1,700.22:1 in Fresno USD, representing the comparative district with the fewest staff relative to student enrollment. The District's ratio at 810.25:1 ranks 2 of 7 in the comparative group, indicating that the District has more staff relative to students enrolled than all but one comparative district. Overall staffing levels for each HR department are illustrated in figure 22.

Figure 22: Talent Division—Overall Staffing

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Total FTEs	27.00	41.00	55.00	43.80	27.00	44.47	31.00
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	1,313.37	1,700.22	574.42	810.25	1,460.85	987.56	1,094.94
Rank	5	7	1	2	6	3	4

It should be noted that, similar to the Finance Division, the District has a relatively high number of positions designated as management within the Talent Division. Specifically, 3.00 FTE are classified as clerical staff with the remaining 40.80 FTE designated as administrative, supervisory, and confidential. Due to the influence the number of confidential staff has on the allocation of management FTE in the Division, it is important to note the distinct differences between confidential and the administrative and supervisory classifications. The confidential classification are non-bargaining unit positions; however, the incumbents are not authorized to act in a supervisory capacity. Confidential positions are assigned duties which require a high level of analytical and technical skill, and the incumbents are responsible for working with a low level of supervision. In addition, an incumbent may also oversee the work of technical staff in the context of managing procedures, but they aren't the direct supervisor of the employee. In review of the comparative group, the District is not an outlier in this area, as the majority of districts reflect a similar management-heavy staffing distribution which is driven by the confidential staffing levels. Fontana USD maintains the highest number of management-to-clerical staff with 1.00 FTE clerical, and 26.00 FTE management staff. Moreno Valley USD maintains the lowest number of management-to-clerical staff with 8.00 FTE clerical staff out of the department total of 55.00 FTE. Of note is that while Moreno Valley maintains the lowest number of management staff, the District is ranked 1 of 7 in the highest staffing ratio. Detailed staffing levels by classification for each HR department are illustrated in figure 23.

Figure 23: Talent Division—Detailed Staffing by Classification

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Administrator FTE	1.00	6.00	1.00	8.00	1.00	2.00	2.00
Director Level FTE	3.00	2.00	3.00	2.00	4.00	3.00	3.00
Manager FTE	1.00	0.00	2.00	8.00	2.00	1.00	2.00
Confidential FTE	23.00	30.00	42.00	16.80	17.00	37.47	22.00
Clerical Staff	1.00	5.00	8.00	3.00	5.00	3.00	3.00
Total FTE	27.00	41.00	55.00	43.80	27.00	44.47	31.00

As noted earlier in this analysis, the Talent Division supports functions related to teacher development and induction commonly shared with educational services. FTE is assigned within the Division to support these functions. While the FTE are reflected in the overall staffing allocation for the Division, figure 24 illustrates the staffing impacts of these function on the Talent Division's ranking within

the comparative group and should be considered in any future staffing decisions made by the District regarding the Division. If the District's teacher development and induction positions (6.00 FTE) are extracted from the Division comparative analysis, the District staffing would drop from 43.80 FTE to 37.80 FTE (see figure 24 below). It is important for the District to consider this function within Talent as the positions are not assigned HR related operational duties.

Figure 24: Teacher Development and Induction Positions

Position	FTE
Manager, New Teacher Support and Development	1.00
Manager, Leader Growth	1.00
Coordinator, New Teacher Support and Development	1.00
Specialist, Educator Effectiveness	1.00
Consulting Teacher	2.00

To provide a focused analysis of each position grouping within the comparative group, positions have been organized in Administrator, Director, Management/Supervisory, Confidential, and Clerical staffing as illustrated in figures 25 through 29.

Administrator Staffing

The Administrator staffing level within the Division is 8.00 FTE, which is the highest in the comparative group. In contrast, there are three districts in the comparative group which provide 1.00 FTE in this classification—Fontana USD, Moreno Valley USD, and Riverside USD. The District's staffing level in the administrator classification is identified as an area which is staffed significantly higher than the comparative districts. The enrollment-to-FTE ratio ranges from 4,436.13:1 in the District to 39,443.00:1 in Riverside USD. The District's ratio ranks 1 of 7 in the comparative group, indicating that the District has more staff relative to students enrolled in the comparative group. All functions within the Talent Division are overseen by the Chief Talent Officer position. It is noted that documents submitted by the District include the job title "Deputy Chief Talent", but Talent staff indicate that the position title was modified to be "Chief Talent" reflecting a removal of the "Deputy" designation in 2019. The Deputy designation was removed throughout this report to accurately reflect the current job title of the position.

The next level of management is the senior partner positions, titled Senior Partner Central Support and Senior Partner School, which are equivalent to senior or executive director positions. There are also two director level positions, Director HR Operations and Director

Talent Development Recruitment and Retention. The department organizational structure reflects variation from the industry standard of an assistant superintendent, executive/senior director, director, supervisor, and supporting technical, analytical, and clerical staff. In addition, the Talent division organizes work in the form of what the District refers to as "school networks". The school network model is uncommon. Typically, HR departments are either split between classified and certificated employee support or alphabetically by last name. This is noted as the job titles require further examination and assessment to determine if the current configuration facilitates or creates barriers to operational efficiencies and effective communication about roles and responsibilities.

Interviews with staff indicate that department leadership is provided by the Chief Talent Officer, Senior Partners, and Director positions. Supervisory responsibilities are assigned to other positions within the department, but they are lower to mid-management or confidential positions, and do not function as true administrator positions.

Figure 25: Talent Division—Administrator Staffing

Talent Division							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Administrator Staff						*Reports to the Deputy Superintendent, Administrative Services*	
	Associate Superintendent, People Services	Chief of Human Resources and Labor Relations	Chief Human Resources Officer	**Chief Talent Officer**	Assistant Superintendent, Personnel, Leadership, and Development	Assistant Superintendent, Human Resources	Assistant Superintendent, Human Resources
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00
		Executive Director, Human Resources Operations		**Central Office Partner**		Executive Director, Human Resources	Executive Director, Human Capital Development
		1.00		**2.00**		1.00	1.00
		Administrator, Labor Relations		**School Partner**			
		1.00		**4.00 (1.0 vacant)**			
		Administrator, Human Resources Recruitment					
		1.00					

Talent Division							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
		Administrator, Human Resources Retention					
		1.00					
		Administrator, Human Resources Selection		**Senior Director, Project Management and Strategic Initiatives Talent**			
		1.00		**1.00**			
Total FTEs	**1.00**	**6.00**	**1.00**	**8.00**	**1.00**	**2.00**	**2.00**
Enrollment	**35,461**	**69,709**	**31,593**	**35,489**	**39,443**	**43,917**	**33,943**
Enrollment/FTE	**35,461.00**	**11,618.17**	**31,593.00**	**4,436.13**	**39,443.00**	**21,958.50**	**16,971.50**
Rank	**6**	**2**	**5**	**1**	**7**	**4**	**3**

Source: District-provided data

Director-Level Staffing

The Director-level staffing within the Department is 2.00 FTE, which is more closely aligned with the comparative group than the administrator positions. There are two districts in the comparative group which provide 2.00 FTE in this classification, (Fresno USD and the District). Riverside USD staffs the most director positions within the group at 4.00 FTE. The enrollment-to-FTE ratio ranges from 9,860.75:1 in Riverside USD to 34,854.50:1 in Fresno USD. The District's ratio ranks 6 of 7 in the comparative group, indicating that the District has comparatively lower staffing levels in this area.

Figure 26: Talent Division—Director Level Staffing

Talent Division							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
Director-level staff							
	Director, People Services (Certificated)	Director, Human Resources	Director III, Human Resources (Certificated)	**Director, Human Resources Operations**	Director V, Certificated Personnel	Director, Human Resources	Director, Certificated Personnel
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00
	Director, People Services (Classified)		Director III, Human Resources (Classified)		Director V, Classified Personnel	Director, Classified Personnel	Director, Classified Personnel
	1.00		1.00		1.00	1.00	1.00
			Director III, Professional Development	**Director, Talent Development, Recruitment, and Retention**		Director, Classified Personnel Professional Development	
			1.00	**1.00**		1.00	

Talent Division							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
							Director, Labor Relations
							1.00
	Assistant Director, Human Resources	Administrative Analyst			Assistant Director, Certificated Personnel		
	1.00	1.00			1.00		
					Assistant Director, Classified Personnel		
					1.00		
Total FTEs	**3.00**	**2.00**	**3.00**	**2.00**	**4.00**	**3.00**	**3.00**
Enrollment	**35,461**	**69,709**	**31,593**	**35,489**	**39,443**	**43,917**	**33,943**
Enrollment/FTE	**11,820.33**	**34,854.50**	**10,531.00**	**17,744.50**	**9,860.75**	**14,639.00**	**11,314.33**
Rank	**4**	**7**	**2**	**6**	**1**	**5**	**3**

Source: District-provided data

Manager Staffing

The District provides the highest staffing level of manager positions within the comparative group at 8.00 FTE. In review of this staffing area, it is determined that 3.00 FTE are assigned the responsibility of teacher development and induction. Positions assigned to functions related to teacher support are Manager Leader Growth (1.00 FTE), Coordinator Residency (1.00 FTE), and Coordinator New Teacher Support and Development (1.00 FTE). However, even with the removal of the 3.00 FTE teacher development and induction positions, the District maintains the highest level of manager level positions in the comparative group with 5.00 FTE positions for HR operational and technical functions.

Staffing levels in this area are highly variable with Fresno USD not providing staffing in this area compare to the District at 8.00 FTE which is the highest number of FTE. The remaining districts in the comparative group provide manager level staffing ranging from 1.00 FTE to 2.00 FTE. The enrollment-to-FTE ratio ranges from 4,436.13:1 in the District to 43,917.00:1 in Santa Ana USD. The District's ratio ranks 1 of 6 in the comparative group (Fresno USD does not have staffing in this classification), indicating that the District provides the highest staffing levels in this area relative to students enrolled in the comparative group.

Figure 27: Talent Division—Manager Staffing

Talent Division							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Manager Staff							
				Manager, Leader Growth			
				1.00 (vacant)			
				Manager, Tech Support			
				1.00			
				Business Manager, HR			
				1.00			

Talent Division							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
				Substitute Services Manager			Operations Manager
				1.00			1.00
				Coordinator, Benefits Management			
				1.00			
				Coordinator, Residency			
				1.00			
			Coordinator, Professional Development	**Coordinator, New Teacher Support and Development**			
			1.00	**1.00**			
				Coordinator, Leaves Management			
				1.00			
						Coordinator, Human Resources	Coordinator, Human Resources Operations
						1.00	1.00
	Supervisor, People Services						
	1.00						
					Credential Analyst		

Talent Division							
	Fontana USD	**Fresno USD**	**Moreno Valley USD**	**Oakland USD**	**Riverside USD**	**Santa Ana USD**	**Stockton USD**
					1.00		
					Resolution Officer		
					1.00		
			Principal on Special Assignment				
			1.00				
Total FTEs	**1.00**	**N/A**	**2.00**	**8.00**	**2.00**	**1.00**	**2.00**
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	35,461.00	N/A	15,796.50	4,436.13	19,721.50	43,917.00	16,971.50
Rank	5	N/A	2	1	4	6	3

Source: District-provided data

Confidential Staffing

The confidential staff group is the largest classification in the Talent Division at 22.80 FTE. In the comparative group, Moreno Valley USD staffs the highest number of confidential staff of 41.00 FTE and the lowest being Riverside USD with 15.00 FTE. The District's staffing level in the confidential classification falls within the median of the comparative group at 22.8 FTE. The enrollment-to-FTE ratio ranges from 770.56:1 in Moreno Valley USD to 2,629.53:1 in Riverside USD. The District's ratio at 1,556.54:1 ranks 3 of 7 in the comparative group, indicating that the District has higher confidential staffing levels relative to students enrolled than most of the districts in the comparative group.

Additionally, some technical and support staff have job titles that also vary from the analyst, generalist, specialist position titles that are commonly found in HR departments. The Employee Support Specialist positions manage the schools within their networks and support both certificated and classified staff, in addition to the administrative team at the schools. The Employee Support Specialists are the largest job classification in the confidential grouping at 8.00 FTE. Review of job descriptions and interviews with staff indicate that

these positions function as HR analysts and generalists providing employee management support in their respective school networks, or the central office.

During fieldwork, the confidential classification positions were examined to determine that they were in the appropriate classification. While positions within human resources have job duties that entail the use of information that needs to be kept confidential, that does not mean that they should be designated as confidential positions. The term "confidential" has a specific and narrow definition that is directly related to collective bargaining and codified in the Government Code. Specifically, Government Code Section 3540.1(c) states (the full text of the statute has been included in Attachment B for the District's reference):

> "Confidential employee means any employee who is required to develop or present management positions with respect to employer-employee relations or whose duties normally require access to confidential information that is used to contribute significantly to the development of management positions."

There may be positions in the District that were designated as confidential under the old definition, which was "any employee who, in the regular course of his or her duties, has access to, or possesses information relating to, his or her employer's employer-employee relations." This broader definition was modified effective January 1, 2004, to become the narrower definition above. SSC's review of job descriptions and interviews with staff indicated that the positions do not develop the position of the District as it relates to negotiations and their access to confidential information is not used in the develop of management positions. In addition, as noted earlier the confidential positions do not function in a supervisory capacity and influence the Department's management staffing ratio to reflect FTE that is not an accurate depiction of functioning administrators and supervisory staff within the department. The overuse of the confidential classification is identified as an area of concern and requires further review.

Figure 28: Talent Division—Confidential Staffing

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Talent Division							
Confidential Staff							
				Associate Systems			
				1.00			
				Assistant Staffing Support			
				4.00 (1.00 vacant)			
		Analyst I, Information Systems		Systems Analyst, Human Resources			
		1.00		1.00			
		Analyst II, Selection Classified and Management	Human Resources Analyst	Specialist, Employee Support Specialist			Personnel Analyst
		2.00	7.00	8.00			8.00
		Analyst II, Legal, Compliance, and Leaves		Specialist, Employee Retirement			
		1.00		1.00			
				Specialist, Human Capital			
				1.00			

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Talent Division							
		Analyst I, Human Resources		**Human Resources Confidential Clerk**	Credential Technician		
		1.00		**0.80**	3.00		
	People Services Assistant			**Associate, Talent Development**			
	4.00			**4.00**			
	People Services Generalist			**Specialist, Educator Effectiveness**			
	2.00			**1.00 (vacant)**			
	People Services Specialist		Human Resources Specialist	**Employee Information Analyst**			Personnel Assistant
	4.00		5.00	**1.00**			3.00
							Senior Personnel Technician
							6.00
	People Services Technician		Human Resources Technician		Human Resources Technician		Personnel Technician I
	8.00		1.00		9.00		2.00
	Guest Services Technician						
	1.00						
	Leave and Compliance Specialist						

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Talent Division							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
	2.00						
					Data Quality Technician		
					1.00		
					Association Representative	Association Representative	Association Representative
					2.00	1.00	2.00
						Lead Credentials Technician	
						1.00	
		Human Resources Data Specialist II				Lead Personnel Technician	
		7.00				2.00	
		Human Resources Data Specialist I				Personnel Technician	
		5.00				8.00	
		Human Resources Specialist				Personnel Assistant	
		7.00				2.00	
		Customer Service Representative				Personnel Clerk	
		3.00				1.00	

Talent Division							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
		Human Resources Assistant					
		1.00					
						PAL	
						2.00	
						Computer Technician	
						0.75	
						Curriculum Specialist	
						1.00	
						Department Specialist	
						1.00	
						Program Specialist	
						1.00	
						Training Specialist	
						1.00	
			Professional Development Specialist			Instructional Coach	
			24.00			12.00	
						Instructional Assistant (Bilingual)	

71

Talent Division							
	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
						0.72	
			Teacher - Professional Development			Teacher	
			4.00			1.00	
Total FTEs	21.00	28.00	41.00	22.80	15.00	35.47	21.00
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	1,688.62	2,489.61	770.56	1,556.54	2,629.53	1,238.14	1,616.33
Rank	5	6	1	3	7	2	4

Source: District-provided data

Clerical Staffing

In the comparative group, the District, Santa Ana USD, and Stockton USD rank the lowest in clerical support staff with 3.00 FTE indicating that the districts employ the fewest support staff level positions. The comparative district that ranks the highest is Moreno Valley USD at 8.00 FTE. Fontana USD has 1.00 FTE support staff, while Riverside USD and Fresno USD have 5.00 FTE support staff positions. The enrollment-to-FTE ratio ranges from 3,949.13:1 in Moreno Valley USD to 35,461.00:1 in Fontana USD. The District's ratio at 11,829.67:1 ranks 4 of 7 in the comparative group, indicating that the District falls within the median range of staff relative to students enrolled in the comparative group.

At 3.0 FTE, the lower level of clerical support staff in the District's Talent Division may be insufficient considering the recruitment activity and other employment management functions within the Division. The staffing level in this area requires further review to ensure that the appropriate level of clerical support is in place.

Figure 29: Talent Division—Clerical Staffing

	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Talent Division							
Clerical Staff							
	Executive Assistant	Executive Secretary to the Superintendent	Administrative Assistant	**Fingerprint Technician**	Executive Assistant II	Executive Secretary	Executive Assistant III
	1.00	1.00	1.00	**1.00**	1.00	1.00	1.00
		Administrative Secretary I	Confidential Secretary	**Consulting Teacher**	Executive Assistant I	Administrative Secretary	
		4.00	1.00	**2.00**	2.00	1.00	
			Secretary III				
			1.00				
			Secretary II				
			1.00				
					Human Resources Office Assistant		Senior Office Assistant
					1.00		2.00
			Clerk III				
			3.00				
			Switchboard Receptionist (Bilingual)		District Receptionist	District Centrex Operator	
			1.00		1.00	1.00	
Total FTEs	**1.00**	**5.00**	**8.00**	**3.00**	**5.00**	**3.00**	**3.00**
Enrollment	35,461	69,709	31,593	35,489	39,443	43,917	33,943
Enrollment/FTE	35,461.00	13,941.80	3,949.13	11,829.67	7,888.60	14,639.00	11,314.33
Rank	7	5	1	4	2	6	3

Source: District-provided data

Recommendations

7. **Consider reorganizing the Talent Division to minimize the separation of duties and increase the integration of services for employee support for schools and the central office, HR operations, and recruitment, residency, and retention services.** The current department structure provides support for each service area in a "departments within the department" model, which represents focused support and corresponding positions in the service areas. The current reporting structure does not encourage cross training and opportunity for staff to assist in other areas of need when the demand is intense, for example with recruitment. The organization of employee support by school limits staff ability to provide services to all employees, and a model which assigns staff to certificated or classified staff support will help with cross training, increasing staff capacity, and allowing for flexibility for staff to assist in high-need areas. It is also noted that employee leave management is an area which did not have the appropriate level of staffing assigned. Reorganization, combined with cross training, could address staffing needs in these areas.

8. **The integration of duties will also contribute to the Talent Division plan for improvements in effective and efficient procedures and set the foundation for the ability to implement systems that improve efficiencies**. Although this analysis did not focus on operational practices, the absence of efficient systems and the relationship to the Division's ability to reduce staff was discussed throughout fieldwork. In order for the Division to consider staffing readjustments, effective procedures are required to prevent significant disruptions to the essential responsibilities of the Division.

9. **Revise the job title for Employee Support Specialist positions to reflect the work performed.** The Employee Support Specialists are technical and analytical positions, but the job titles vary from the analyst, generalist, specialist position titles that are commonly found in HR departments. In review of the job descriptions and through interviews with staff, it is determined that the job titles for these positions are confusing to internal and external stakeholders as they do not communicate the work of the position. It would help communicate the role of the Employee Support Specialist positions by revising the job title to HR Generalist.

10. **Revise the Talent Division management-level positions by changing the job titles to help communicate the leadership role of these key positions.** The executive leadership position titles within the Division do no not align with industry standard, and do not accurately reflect the work performed by each position. The recommendations for revised job titles shown in figure 30 align with similar recommendations made in this section.

Figure 30: Talent Division—Recommended Revised Job Titles

Current Job Title	Recommended Job Title
Chief Talent Officer	Associate or Assistant Superintendent, Human Resources
Senior Partner (School and Central Office)	Executive Director, Human Resources

All functions within the Division are overseen by the Chief Talent Officer position. The next level of management are the Senior Partner positions, titled Senior Partner Central Support and Senior Partner School, which are equivalent to senior or executive director positions. There are also two director level positions—Director HR Operations and Director Talent Development Recruitment and Retention. The Division organizational structure reflects variation from the industry standard of an assistant superintendent, executive/senior director, director, supervisor, and supporting technical, analytical, and clerical staff.

11. **Reconsider the Division name to reflect the industry standard.** The current department name of Talent Division does not reflect the industry standard. Revision of the name to Human Resources Services will help align the functional name with the positions within the Division. This recommendation aligns with the recommended job title changes also included in this report.

12. **Reassign employee benefits to a shared model with the Finance Division.** Employee benefits are managed in the Talent Division. The single department model currently in place to support this service causes considerable strain on the Division. The District should consider examining the duties assigned to support benefits, and through a collaborative process, discuss the assignment of partial responsibility to the Fiscal Services Department.

13. **Evaluate positions within the Division in the confidential classification to determine if they are appropriately classified.** We recommend that the District examine the confidential positions to make the determination that they meet the statutory requirements for the confidential classification. Should a position require reclassification, the District will need to work with the appropriate bargaining group to address the reclassification process, as the positions would become part of the bargaining unit. It is recognized that this process may be difficult and complex to manage, and it could potentially be perceived as a demotion. Due to these factors, we recommend as another option to consider the positions for reclassification when they become vacant, or during the reorganization process to encourage a successful transition for staff and the District.

14. **Assess clerical and administrative support within the Talent Division to determine if the staffing levels are in alignment with administrative support needs.** The current allocation of clerical staffing is in the lower tier of the comparative group. This recommendation should be addressed in concert with the evaluation of confidential positions within the Division as adjustments made in the confidential area will reclassify the positions as clerical/technical positions. This will help alleviate the needs in the administrative support staffing levels and provide additional flexibility in the Division's ability to respond during periods of intensified workloads.

Summary and Conclusion

The summary comparison of District office positions supporting the functions under review is provided in figure 31. In terms of absolute FTE, the District reported the second lowest staffing level at 115.35 FTE, just above Stockton USD at 108.00 FTE. The comparative group ranges from 108.00 FTE in Stockton USD to 211.65 FTE in Fresno USD. The second highest FTE was reported in Santa Ana USD at 127.47 FTE. In terms of enrollment-to-staff ratios, the comparative group ranges from 250.74:1 in Moreno Valley USD to 344.53:1 in Santa Ana USD. The District ranks 3 of 7 at 307.66:1.

Consideration must also be given to the larger number of schools the District operates—more than double the comparative districts of similar enrollment. Because many of the functions under review provide direct services to schools, a comparison of FTE per school is also provided. The comparative group ranges from 3.23 FTE per school in Moreno Valley USD to 1.42 FTE per school in the District, indicating that the District has fewer staff in the functions reviewed to support the schools and associated operations.

Figure 31: Summary of Staffing

Division/Department	Fontana USD	Fresno USD	Moreno Valley USD	Oakland USD	Riverside USD	Santa Ana USD	Stockton USD
Finance—Accounting, AP, Budget, Payroll	35.00	47.65	26.00	**32.80**	32.00	35.00	32.00
Finance—Procurement	6.00	17.00	7.00	**4.00**	9.00	9.00	8.00
Finance—Risk Management	3.50	13.00	5.00	**8.75**	8.00	10.00	9.00
Information Technology Services	54.00	93.00	33.00	**26.00**	44.00	29.00	28.00
Talent	27.00	41.00	55.00	**43.80**	27.00	44.47	31.00
Total FTEs	*125.50*	*211.65*	*126.00*	*115.35*	*120.00*	*127.47*	*108.00*
Enrollment	35,461	69,709	31,593	**35,489**	39,443	43,917	33,943
Enrollment per FTE	**282.56**	**329.36**	**250.74**	**307.66**	**328.69**	**344.53**	**314.29**
Rank	**2**	**6**	**1**	**3**	**5**	**7**	**4**
Number of Schools	45	100	39	**81**	47	54	56
FTE per School	**2.79**	**2.12**	**3.23**	**1.42**	**2.55**	**2.36**	**1.93**
Rank	**2**	**5**	**1**	**7**	**3**	**4**	**6**

As noted earlier in this analysis, while this staffing data is provided for comparison purposes, there are many factors that can influence a district's staffing such as available financial resources, differing programmatic emphasis, number of facilities and programs served, which services are contracted out, etc., though enrollment is typically the primary factor. The economies of scale for larger districts have an impact on the numbers of staff positions. In other words, there must be a certain number of staff positions to handle the centralized functions required for each district, and the staffing levels are, to a lesser extent, related to enrollment. It should also be noted that because of the large number of schools operated by the District, many of the economies of scale one would expect to find are absent, as a higher level of staffing is required to support the operational functions associated with individual schools.

The process to assess the current staffing levels and identify areas that can sustain adjustment includes a shared responsibility approach which requires collaboration and partnerships within the school community. The focus should be on activities that are central to attaining instructional goals and support operational management. The first step in the assessment process includes an evaluation of essential services and programs, and the staffing levels assigned to support those functions as illustrated in figure 32.

Staffing levels should reflect the resources needed to support initiatives and goals, and every school district will produce a unique list due to the variance of student populations and communities they serve.

Figure 32: Identification of Services
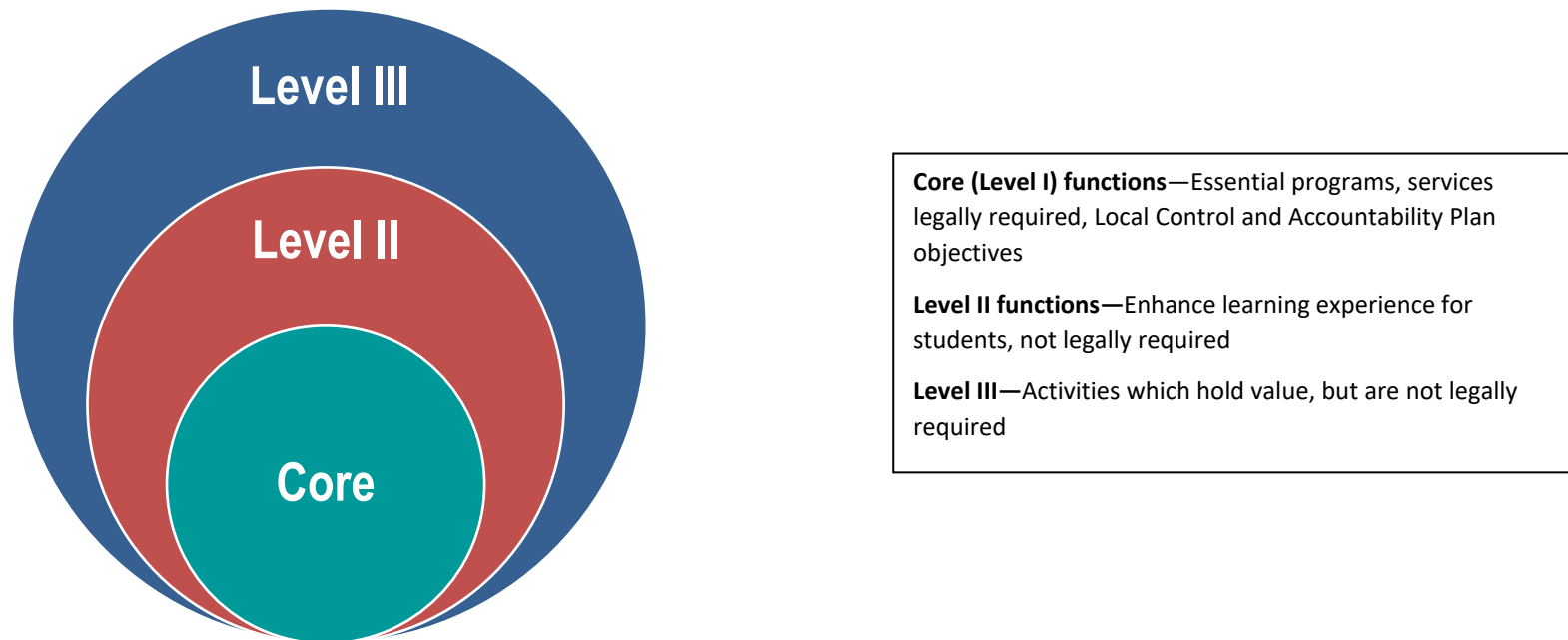
The consideration of operational impacts is critical, as the elimination of services in one function impacts student support and instructional programs in other areas. Operational services and student learning intersect in many ways, and recognition of how school-level staffing levels influence central office staffing should be included in decisions related to department staffing allocations.

While the District should consider all the findings and recommendations provided in the report, specifically, we highlight the following:

- The proportion of management and confidential positions compared to all staff positions in the Finance Division's Accounting, Accounts Payable, Budget, and Payroll Department and Risk Management Department should be examined

- Review of the lower number of Procurement Department staff relative to all other districts, specifically in the purchasing technician and buyer job classifications (nonmanagement) to determine if the staffing level supports the needed functions and services

- Reorganization of the Talent Division to minimize the separation of duties and increase the integration of services for employee support for schools and the central office, HR operations, and recruitment, residency, and retention services

- Revision of job titles for Talent Division positions, as well as revision of the Division name to align with industry standard

- Assessment of clerical and administrative support in the Talent Division to align with support needs

- An evaluation of staffing of the Information Technology Services Department to address school support needs as well as additional management and clerical support required as a result of the findings

- Reorganization of the Information Technology Services Department by functional area to align functions and oversight

- Evaluation of the District's technology procedures and standards to ensure the selection of technology that is supportable by the Department and aligns with the District's technology needs and plan

All areas of district staffing should periodically be evaluated to ensure staffing levels are appropriate, with focus on the District's priorities and goals as defined by the Board and District leadership, as well as available financial resources. This report should serve as a baseline for future analysis by the District as it evaluates its staffing and organizational needs.

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Fontana Unified Report (36-67710)

+ Report Description

— Report Options and Filters

Report Selection

Report:

Enrollment for Charter and Non-Charter Schools (with School data) ⌄

County:

36 - San Bernardino ⌄

District:

3667710 - Fontana Unified ⌄

Year:

2020-21 ⌄

Report Filters

Gender:
◉ **All Students**   ○ **Male**   ○ **Female**   ○ **Non-binary**

English Learners:
◉ **All Students**   ○ **Yes**   ○ **No**

Students With Disabilities:
◉ **All Students**   ○ **Yes**   ○ **No**

Program Subgroups:

- No Subgroup Filters ⌄

Display Options

View Data As:

◉ Numbers   ○ Row Percents   ○ Column Percents

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Alder Middle	0	1,037	1,037
Almeria Middle	0	754	754
Almond Elementary	0	487	487
Beech Avenue Elementary	0	742	742
Canyon Crest Elementary	0	437	437
Chaparral Academy of Technology	0	301	301
Citrus Elementary	0	747	747
Citrus High (Continuation)	0	266	266
Cypress Elementary	0	628	628
Date Elementary	0	606	606
District Office	0	21	21
Dolores Huerta International Academy	0	623	623
Dorothy Grant Innovations Academy	0	679	679
Eric Birch High (Continuation)	0	180	180
Fontana A. B. Miller High	0	2,218	2,218
Fontana High	0	2,554	2,554
Fontana Middle	0	1,180	1,180
Harry S. Truman Middle	0	1,037	1,037
Hemlock Elementary	0	476	476
Henry J. Kaiser High	0	2,148	2,148
Juniper Elementary	0	464	464
Jurupa Hills High	0	1,921	1,921

Kathy Binks Elementary	0	565	**565**
Live Oak Elementary	0	466	**466**
Locust Elementary	0	373	**373**
Mango Elementary	0	517	**517**
Maple Elementary	0	582	**582**
Nonpublic, Nonsectarian Schools	0	49	**49**
North Tamarind Elementary	0	460	**460**
Oak Park Elementary	0	406	**406**
Oleander Elementary	0	668	**668**
Palmetto Elementary	0	669	**669**
Poplar Elementary	0	538	**538**
Randall Pepper Elementary	0	527	**527**
Redwood Elementary	0	524	**524**
Sequoia Middle	0	993	**993**
Shadow Hills Elementary	0	411	**411**
Sierra Lakes Elementary	0	704	**704**
South Tamarind Elementary	0	591	**591**
Southridge Tech Middle	0	996	**996**
Summit High	0	2,624	**2,624**
Ted Porter Elementary	0	720	**720**
Tokay Elementary	0	476	**476**
Virginia Primrose Elementary	0	375	**375**
Wayne Ruble Middle	0	1,310	**1,310**
West Randall Elementary	0	411	**411**
Total	**0**	**35,461**	**35,461**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Fresno Unified Report (10-62166)

+ Report Description

+ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Addams Elementary	0	799	**799**
Ahwahnee Middle	0	709	**709**
Akira Yokomi Elementary	0	730	**730**
Ann B. Leavenworth	0	823	**823**
Aspen Meadow Public	257	0	**257**
Aspen Valley Prep Academy	392	0	**392**
Ayer Elementary	0	741	**741**
Aynesworth Elementary	0	632	**632**
Baird Middle	0	602	**602**
Birney Elementary	0	765	**765**
Bullard High	0	2,513	**2,513**
Bullard Talent	0	761	**761**
Burroughs Elementary	0	752	**752**
Calwa Elementary	0	617	**617**
Cambridge Continuation High	0	540	**540**
Carter G. Woodson Public Charter	358	0	**358**
Centennial Elementary	0	746	**746**
Columbia Elementary	0	524	**524**
Cooper Middle	0	563	**563**

David L. Greenberg Elementary	0	563	**563**
Deborah A. Williams Elementary	0	651	**651**
Del Mar Elementary	0	569	**569**
Design Science Middle College High	0	266	**266**
Dewolf Continuation High	0	185	**185**
District Office	0	230	**230**
Easterby Elementary	0	665	**665**
Eaton Elementary	0	466	**466**
Edison Computech	0	826	**826**
Edison High	0	2,617	**2,617**
Edith B. Storey Elementary	0	928	**928**
Elizabeth Terronez Middle	0	649	**649**
Endeavor Charter	293	0	**293**
Ericson Elementary	0	710	**710**
Erma Duncan Polytechnical High	0	1,178	**1,178**
Ewing Elementary	0	817	**817**
Ezekiel Balderas Elementary	0	637	**637**
Figarden Elementary	0	557	**557**
Florence E. Rata	0	26	**26**
Forkner Elementary	0	481	**481**
Fort Miller Middle	0	687	**687**
Fremont Elementary	0	456	**456**
Fresno High	0	2,214	**2,214**
Fulton	0	20	**20**
Gibson Elementary	0	443	**443**
Hamilton Elementary	0	831	**831**
Heaton Elementary	0	545	**545**
Herbert Hoover High	0	2,018	**2,018**
Holland Elementary	0	438	**438**

Homan Elementary	0	601	**601**
Irwin O. Addicott Elementary	0	43	**43**
J. E. Young Academic Center	0	472	**472**
Jackson Elementary	0	395	**395**
Jefferson Elementary	0	461	**461**
King Elementary	0	588	**588**
Kings Canyon Middle	0	946	**946**
Kirk Elementary	0	376	**376**
Kratt Elementary	0	547	**547**
Lane Elementary	0	575	**575**
Lawless Elementary	0	575	**575**
Lincoln Elementary	0	564	**564**
Lowell Elementary	0	368	**368**
Malloch Elementary	0	447	**447**
Manchester Gate	0	714	**714**
Mario G. Olmos Elementary	0	673	**673**
Mayfair Elementary	0	630	**630**
McCardle Elementary	0	477	**477**
McLane High	0	1,898	**1,898**
Miguel Hidalgo Elementary	0	631	**631**
Molly S. Bakman Elementary	0	743	**743**
Morris E. Dailey Charter Elementary	379	0	**379**
Muir Elementary	0	495	**495**
Nonpublic, Nonsectarian Schools	0	33	**33**
Norseman Elementary	0	726	**726**
Phillip J Patino School of Entrepreneurship	0	264	**264**
Phoenix Elementary Academy Community Day	0	35	**35**

Phoenix Secondary	0	44	**44**
Powers-Ginsburg Elementary	0	471	**471**
Pyle Elementary	0	748	**748**
Robinson Elementary	0	490	**490**
Roeding Elementary	0	653	**653**
Roosevelt High	0	2,241	**2,241**
Rowell Elementary	0	646	**646**
Rutherford B. Gaston Sr. Middle	0	824	**824**
Scandinavian Middle	0	820	**820**
School of Unlimited Learning	145	0	**145**
Sequoia Middle	0	907	**907**
Sierra Charter	403	0	**403**
Slater Elementary	0	637	**637**
Starr Elementary	0	343	**343**
Sunnyside High	0	2,948	**2,948**
Sunset Elementary	0	387	**387**
Susan B. Anthony Elementary	0	465	**465**
Tehipite Middle	0	481	**481**
Tenaya Middle	0	848	**848**
Thomas Elementary	0	777	**777**
Tioga Middle	0	700	**700**
Turner Elementary	0	609	**609**
University High	483	0	**483**
Vang Pao Elementary	0	852	**852**
Viking Elementary	0	720	**720**
Vinland Elementary	0	496	**496**
Wawona K-8	0	580	**580**
Webster Elementary	0	334	**334**
Wilson Elementary	0	683	**683**

Winchell Elementary	0	684	**684**
Wishon Elementary	0	504	**504**
Wolters Elementary	0	412	**412**
Yosemite Middle	0	638	**638**
Total	**2,710**	**69,709**	**72,419**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Moreno Valley Unified Report (33-67124)

+ Report Description

+ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Alessandro	0	56	**56**
Armada Elementary	0	806	**806**
Badger Springs Middle	0	1,132	**1,132**
Bayside Community Day	0	93	**93**
Bear Valley Elementary	0	790	**790**
Box Springs Elementary	0	435	**435**
Butterfield Elementary	0	910	**910**
Canyon Springs High	0	2,219	**2,219**
Chaparral Hills Elementary	0	599	**599**
Cloverdale Elementary	0	727	**727**
Creekside Elementary	0	545	**545**
Edgemont Elementary	0	627	**627**
Hendrick Ranch Elementary	0	557	**557**
Hidden Springs Elementary	0	585	**585**
Honey Hollow Elementary	0	611	**611**
La Jolla Elementary	0	707	**707**
Landmark Middle	0	984	**984**
March Mountain High	0	224	**224**
March Valley	0	63	**63**

Midland Elementary	0	572	**572**
Moreno Elementary	0	460	**460**
Moreno Valley Community Learning Center	4	0	**4**
Moreno Valley High	0	2,256	**2,256**
Moreno Valley Online Academy	0	268	**268**
Mountain View Middle	0	1,334	**1,334**
Nonpublic, Nonsectarian Schools	0	51	**51**
North Ridge Elementary	0	728	**728**
Palm Middle	0	1,089	**1,089**
Ramona Elementary	0	595	**595**
Ridge Crest Elementary	0	554	**554**
Seneca Elementary	0	456	**456**
Serrano Elementary	0	436	**436**
Sugar Hill Elementary	0	588	**588**
Sunnymead Elementary	0	757	**757**
Sunnymead Middle	0	1,268	**1,268**
Sunnymeadows Elementary	0	575	**575**
TownGate Elementary	0	698	**698**
Valley View High	0	2,856	**2,856**
Vista del Lago High	0	2,033	**2,033**
Vista Heights Middle	0	1,349	**1,349**
Total	**4**	**31,593**	**31,597**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Oakland Unified Report (01-61259)

✚ Report Description

✚ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Achieve Academy	607	0	**607**
ACORN Woodland Elementary	0	276	**276**
Allendale Elementary	0	354	**354**
American Indian Public Charter	240	0	**240**
American Indian Public Charter II	659	0	**659**
American Indian Public High	446	0	**446**
ARISE High	387	0	**387**
ASCEND	510	0	**510**
Aspire Berkley Maynard Academy	561	0	**561**
Aspire College Academy	271	0	**271**
Aspire ERES Academy	228	0	**228**
Aspire Golden State College Preparatory Academy	608	0	**608**
Aspire Lionel Wilson College Preparatory Academy	505	0	**505**
Aspire Monarch Academy	414	0	**414**
Aspire Triumph Technology Academy	286	0	**286**
Bay Area Technology	353	0	**353**
Bella Vista Elementary	0	439	**439**

Bret Harte Middle	0	557	**557**
Bridges Academy	0	422	**422**
Brookfield Elementary	0	213	**213**
Burckhalter Elementary	0	193	**193**
Carl B. Munck Elementary	0	227	**227**
Castlemont High	0	749	**749**
Chabot Elementary	0	568	**568**
Civicorps Corpsmember Academy	54	0	**54**
Claremont Middle	0	498	**498**
Cleveland Elementary	0	403	**403**
Coliseum College Prep Academy	0	599	**599**
Community Day	0	19	**19**
Community United Elementary	0	299	**299**
Conservatory of Vocal/Instrumental Arts High	55	0	**55**
Crocker Highlands Elementary	0	452	**452**
Dewey Academy	0	195	**195**
Downtown Charter Academy	318	0	**318**
East Bay Innovation Academy	630	0	**630**
East Oakland Pride Elementary	0	326	**326**
Edna Brewer Middle	0	812	**812**
Elmhurst United Middle	0	726	**726**
Emerson Elementary	0	328	**328**
EnCompass Academy Elementary	0	329	**329**
Esperanza Elementary	0	378	**378**
Francophone Charter School of Oakland	311	0	**311**
Franklin Elementary	0	586	**586**

Fred T. Korematsu Discovery Academy	0	213	**213**
Fremont High	0	927	**927**
Frick United Academy of Language	0	337	**337**
Fruitvale Elementary	0	270	**270**
Futures Elementary	0	319	**319**
Garfield Elementary	0	604	**604**
Gateway to College at Laney College	0	78	**78**
Glenview Elementary	0	473	**473**
Global Family	0	449	**449**
Grass Valley Elementary	0	243	**243**
Greenleaf Elementary	0	639	**639**
Hillcrest Elementary	0	394	**394**
Home and Hospital Program	0	10	**10**
Hoover Elementary	0	276	**276**
Horace Mann Elementary	0	235	**235**
Howard Elementary	0	273	**273**
Independent Study, Sojourner Truth	0	147	**147**
Infant and Preschool Program	0	5	**5**
International Community	0	276	**276**
Joaquin Miller Elementary	0	430	**430**
KIPP Bridge Academy	560	0	**560**
La Escuelita Elementary	0	408	**408**
Laurel Elementary	0	444	**444**
Learning Without Limits	411	0	**411**
LIFE Academy	0	464	**464**
Lighthouse Community Charter	511	0	**511**

Lighthouse Community Charter High	304	0	**304**
Lincoln Elementary	0	738	**738**
Lodestar: A Lighthouse Community Charter Public	645	0	**645**
LPS Oakland R & D Campus	492	0	**492**
Madison Park Academy 6-12	0	754	**754**
Madison Park Academy TK-5	0	267	**267**
Manzanita Community	0	388	**388**
Manzanita SEED Elementary	0	446	**446**
Markham Elementary	0	269	**269**
Martin Luther King, Jr. Elementary	0	352	**352**
McClymonds High	0	357	**357**
Melrose Leadership Academy	0	635	**635**
MetWest High	0	247	**247**
Montclair Elementary	0	605	**605**
Montera Middle	0	633	**633**
New Highland Academy	0	317	**317**
Nonpublic, Nonsectarian Schools	0	137	**137**
North Oakland Community Charter	159	0	**159**
Oakland Charter Academy	248	0	**248**
Oakland Charter High	459	0	**459**
Oakland High	0	1,650	**1,650**
Oakland International High	0	341	**341**
Oakland Military Institute, College Preparatory Academy	627	0	**627**
Oakland School for the Arts	801	0	**801**
Oakland Technical High	0	1,961	**1,961**
Oakland Unity High	372	0	**372**

Parker Elementary	0	257	257
Peralta Elementary	0	347	347
Piedmont Avenue Elementary	0	339	339
Prescott	0	119	119
Ralph J. Bunche High	0	77	77
Reach Academy	0	406	406
Redwood Heights Elementary	0	358	358
Rise Community	0	214	214
Roosevelt Middle	0	615	615
Rudsdale Continuation	0	294	294
Sankofa United	0	192	192
Sequoia Elementary	0	439	439
Skyline High	0	1,660	1,660
Street Academy (Alternative)	0	87	87
Think College Now	0	298	298
Thornhill Elementary	0	396	396
United for Success Academy	0	385	385
Urban Promise Academy	0	379	379
Vincent Academy	183	0	183
West Oakland Middle	0	212	212
Westlake Middle	0	304	304
Young Adult Program	0	152	152
Total	**13,215**	**35,489**	**48,704**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Riverside Unified Report (33-67215)

✚ Report Description

✚ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Abraham Lincoln Continuation	0	179	**179**
Adams Elementary	0	503	**503**
Alcott Elementary	0	662	**662**
Amelia Earhart Middle	0	908	**908**
Arlington High	0	1,927	**1,927**
Benjamin Franklin Elementary	0	786	**786**
Bryant Elementary	0	384	**384**
Castle View Elementary	0	619	**619**
Central Middle	0	677	**677**
Chemawa Middle	0	873	**873**
Emerson Elementary	0	644	**644**
Frank Augustus Miller Middle	0	984	**984**
Fremont Elementary	0	530	**530**
Harrison Elementary	0	452	**452**
Hawthorne Elementary	0	624	**624**
Highgrove Elementary	0	746	**746**
Highland Elementary	0	611	**611**
Jackson Elementary	0	687	**687**
Jefferson Elementary	0	953	**953**

John F. Kennedy Elementary	0	901	**901**
John W. North High	0	2,294	**2,294**
Lake Mathews Elementary	0	764	**764**
Liberty Elementary	0	588	**588**
Longfellow Elementary	0	681	**681**
Madison Elementary	0	633	**633**
Magnolia Elementary	0	531	**531**
Mark Twain Elementary	0	989	**989**
Martin Luther King Jr. High	0	3,081	**3,081**
Matthew Gage Middle	0	996	**996**
Monroe Elementary	0	599	**599**
Mountain View Elementary	0	791	**791**
Nonpublic, Nonsectarian Schools	0	48	**48**
Opportunity Program	0	14	**14**
Pachappa Elementary	0	675	**675**
Patricia Beatty Elementary	0	530	**530**
Polytechnic High	0	2,543	**2,543**
Raincross High (Continuation)	0	274	**274**
Ramona High	0	2,213	**2,213**
REACH Leadership STEAM Academy	640	0	**640**
Riverside STEM Academy	0	655	**655**
Riverside Virtual	0	17	**17**
Sierra Middle	0	870	**870**
Summit View Independent Study	0	911	**911**
Sunshine Special Education	0	65	**65**
Tomas Rivera Elementary	0	675	**675**
University Heights Middle	0	882	**882**
Victoria Elementary	0	527	**527**
Washington Elementary	0	814	**814**

William Howard Taft Elementary	0	541	**541**
Woodcrest Elementary	0	592	**592**
Total	**640**	**39,443**	**40,083**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Santa Ana Unified Report (30-66670)

✚ Report Description

✚ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Abraham Lincoln Elementary	0	646	**646**
Adams Elementary	0	404	**404**
Advanced Learning Academy	354	0	**354**
Andrew Jackson Elementary	0	640	**640**
Carl Harvey Elementary	0	372	**372**
Century High	0	1,643	**1,643**
Cesar E. Chavez High	0	359	**359**
Diamond Elementary	0	473	**473**
Douglas MacArthur Fundamental Intermediate	0	1,219	**1,219**
Edward B. Cole Academy	406	0	**406**
El Sol Santa Ana Science and Arts Academy	921	0	**921**
Franklin Elementary	0	377	**377**
Fremont Elementary	0	447	**447**
Garfield Elementary	0	633	**633**
George Washington Carver Elementary	0	493	**493**
Gerald P. Carr Intermediate	0	1,296	**1,296**
Gonzalo Felicitas Mendez Fundamental Intermediate	0	1,448	**1,448**

Greenville Fundamental Elementary	0	976	**976**
Hector G. Godinez	0	2,409	**2,409**
Heroes Elementary	0	478	**478**
Hoover Elementary	0	320	**320**
Jefferson Elementary	0	651	**651**
Jim Thorpe Fundamental	0	883	**883**
John F. Kennedy Elementary	0	532	**532**
John Muir Fundamental Elementary	0	776	**776**
Jose Sepulveda Elementary	0	319	**319**
Julia C. Lathrop Intermediate	0	805	**805**
Lorin Griset Academy	0	318	**318**
Lowell Elementary	0	573	**573**
Madison Elementary	0	950	**950**
Manuel Esqueda Elementary	0	1,001	**1,001**
Martin Elementary	0	574	**574**
Martin Luther King Jr. Elementary	0	560	**560**
Martin R. Heninger Elementary	0	1,069	**1,069**
McFadden Intermediate	0	1,037	**1,037**
Middle College High	0	368	**368**
Monroe Elementary	0	262	**262**
Monte Vista Elementary	0	454	**454**
Nonpublic, Nonsectarian Schools	0	45	**45**
Nova Academy Early College High	370	0	**370**
Orange County Educational Arts Academy	625	0	**625**
Pio Pico Elementary	0	474	**474**
Raymond A. Villa Fundamental Intermediate	0	1,317	**1,317**

REACH Academy	0	197	**197**
Romero-Cruz Academy	0	901	**901**
Roosevelt Walker Academy	0	892	**892**
Saddleback High	0	1,575	**1,575**
Santa Ana High	0	3,323	**3,323**
Santiago Elementary	0	1,043	**1,043**
Segerstrom High	0	2,513	**2,513**
Sierra Preparatory Academy	0	601	**601**
Taft Elementary	0	493	**493**
Thomas A. Edison Elementary	0	436	**436**
Valley High	0	2,227	**2,227**
Wallace R. Davis Elementary	0	451	**451**
Washington Elementary	0	631	**631**
Willard Intermediate	0	559	**559**
Wilson Elementary	0	474	**474**
Total	**2,676**	**43,917**	**46,593**

California Department of Education

2020-21 Enrollment for Charter and Non-Charter Schools

Stockton Unified Report (39-68676)

✚ Report Description

✚ Report Options and Filters

Name	Charter School Enrollment	Non-Charter School Enrollment	Total Enrollment
Adams Elementary	0	482	**482**
Alexander Hamilton Elementary	0	750	**750**
Aspire APEX Academy	324	0	**324**
Aspire Langston Hughes Academy	820	0	**820**
Aspire Port City Academy	438	0	**438**
Aspire Rosa Parks Academy	405	0	**405**
Aspire Stockton 6-12 Secondary Academy	41	0	**41**
Aspire Stockton TK-5 Elementary Academy	67	0	**67**
August Elementary	0	564	**564**
Cesar Chavez High	0	2,270	**2,270**
Cleveland Elementary	0	666	**666**
Commodore Stockton Skills	0	1,031	**1,031**
District Special Education	0	107	**107**
Dolores Huerta Elementary	0	447	**447**
Dr. Lewis Dolphin Stallworth Sr. Charter	241	0	**241**
Edison High	0	2,468	**2,468**

Edward C. Merlo Institute of Environmental Studies	0	210	**210**
El Dorado Elementary	0	542	**542**
Elmwood Elementary	0	780	**780**
Fillmore Elementary	0	649	**649**
Flora Arca Mata	0	433	**433**
Franklin High	0	2,265	**2,265**
George W. Bush Elementary	0	843	**843**
George Washington Elementary	0	207	**207**
Grunsky Elementary	0	484	**484**
Harrison Elementary	0	624	**624**
Hazelton Elementary	0	704	**704**
Health Careers Academy	456	0	**456**
Hoover Elementary	0	682	**682**
Jane Frederick High	0	141	**141**
John C. Fremont Elementary	0	824	**824**
John Marshall Elementary	0	477	**477**
Kennedy Elementary	0	486	**486**
King Elementary	0	1,025	**1,025**
Kohl Open Elementary	0	222	**222**
Madison Elementary	0	731	**731**
Marshall K-8 Community Day	0	4	**4**
Maxine Hong Kingston Elementary	0	834	**834**
McKinley Elementary	0	822	**822**
Monroe Elementary	0	541	**541**
Montezuma Elementary	0	672	**672**
Nightingale Charter	417	0	**417**
Nonpublic, Nonsectarian Schools	0	55	**55**
Pacific Law Academy	210	0	**210**

Pittman Charter	721	0	**721**
Primary Years Academy	0	287	**287**
Pulliam Elementary	0	648	**648**
Rio Calaveras Elementary	0	828	**828**
Roosevelt Elementary	0	389	**389**
San Joaquin Elementary	0	755	**755**
Spanos (Alex G.) Elementary	0	434	**434**
Stagg Senior High	0	1,839	**1,839**
Stockton Collegiate International Elementary	457	0	**457**
Stockton Collegiate International Secondary	514	0	**514**
Stockton Early College Academy	443	0	**443**
Stockton High	0	166	**166**
Taft Elementary	0	470	**470**
Taylor Leadership Academy	0	429	**429**
TEAM Charter	663	0	**663**
Team Charter Academy	225	0	**225**
Valentine Peyton Elementary	0	852	**852**
Van Buren Elementary	0	527	**527**
Victory Elementary	0	512	**512**
Vision Quest & Career Pathway	197	0	**197**
Voices College Bound Language Academy at Stockton	45	0	**45**
Walton Development Center	0	102	**102**
Weber Institute	0	408	**408**
Wilhelmina Henry Elementary	0	904	**904**
Wilson Elementary	0	351	**351**
Total	**6,684**	**33,943**	**40,627**

Attachment B: Government Code Section (GC §) 3540.1

GOVERNMENT CODE - GOV

TITLE 1. GENERAL [25 - 680.4]

(Title 1 enacted by Stats. 1943, Ch. 134.)

DIVISION 4. PUBLIC OFFICERS AND EMPLOYEES [1000 - 3599]

(Division 4 enacted by Stats. 1943, Ch. 134.)

CHAPTER 10.7. Meeting and Negotiating in Public Educational Employment [3540 - 3549.3]

(Chapter 10.7 added by Stats. 1975, Ch. 961.)

ARTICLE 1. General Provisions [3540 - 3540.2]

(Article 1 added by Stats. 1975, Ch. 961.)

3540.1.

As used in this chapter:

(a) "Board" means the Public Employment Relations Board created pursuant to Section 3541.

(b) "Certified organization" or "certified employee organization" means an organization that has been certified by the board as the exclusive representative of the public school employees in an appropriate unit after a proceeding under Article 5 (commencing with Section 3544).

(c) "Confidential employee" means an employee who is required to develop or present management positions with respect to employer-employee relations or whose duties normally require access to confidential information that is used to contribute significantly to the development of management positions.

(d) "Employee organization" means an organization that includes employees of a public school employer and that has as one of its primary purposes representing those employees in their relations with that public school employer. "Employee organization" shall also include any person of the organization authorized to act on its behalf.

(e) "Exclusive representative" means the employee organization recognized or certified as the exclusive negotiating representative of public school employees, as "public school employee" is defined in subdivision (j), in an appropriate unit of a public school employer.

(f) "Impasse" means that the parties to a dispute over matters within the scope of representation have reached a point in meeting and negotiating at which their differences in positions are so substantial or prolonged that future meetings would be futile.

(g) "Management employee" means an employee in a position having significant responsibilities for formulating district policies or administering district programs. Management positions shall be designated by the public school employer subject to review by the Public Employment Relations Board.

(h) "Meeting and negotiating" means meeting, conferring, negotiating, and discussing by the exclusive representative and the public school employer in a good faith effort to reach agreement on matters within the scope of representation and the execution, if requested by either party, of a written document incorporating any agreements reached, which document

shall, when accepted by the exclusive representative and the public school employer, become binding upon both parties and, notwithstanding Section 3543.7, is not subject to subdivision 2 of Section 1667 of the Civil Code. The agreement may be for a period of not to exceed three years.

(i) "Organizational security" is within the scope of representation, and means either of the following:

(1) An arrangement pursuant to which a public school employee may decide whether or not to join an employee organization, but which requires him or her, as a condition of continued employment, if he or she does join, to maintain his or her membership in good standing for the duration of the written agreement. However, an arrangement shall not deprive the employee of the right to terminate his or her obligation to the employee organization within a period of 30 days following the expiration of a written agreement.

(2) An arrangement that requires an employee, as a condition of continued employment, either to join the recognized or certified employee organization, or to pay the organization a service fee in an amount not to exceed the standard initiation fee, periodic dues, and general assessments of the organization for the duration of the agreement, or a period of three years from the effective date of the agreement, whichever comes first.

(j) "Public school employee" or "employee" means a person employed by a public school employer except persons elected by popular vote, persons appointed by the Governor of this state, management employees, and confidential employees.

(k) "Public school employer" or "employer" means the governing board of a school district, a school district, a county board of education, a county superintendent of schools, a charter school that has declared itself a public school employer pursuant to subdivision (b) of Section 47611.5 of the Education Code, an auxiliary organization established pursuant to Article 6 (commencing with Section 72670) of Chapter 6 of Part 45 of Division 7 of Title 3 of the Education Code, except an auxiliary organization solely formed as or operating a student body association or student union, or a joint powers agency, except a joint powers agency established solely to provide services pursuant to Section 990.8, if all the following apply to the joint powers agency:

(1) It is created as an agency or entity that is separate from the parties to the joint powers agreement pursuant to Section 6503.5.

(2) It has its own employees separate from employees of the parties to the joint powers agreement.

(3) Any of the following are true:

(A) It provides educational services primarily performed by a school district, county board of education, or county superintendent of schools.

(B) A school district, county board of education, or county superintendent of schools is designated in the joint powers agreement pursuant to Section 6509.

(C) It is comprised solely of educational agencies.

(l) "Recognized organization" or "recognized employee organization" means an employee organization that has been recognized by an employer as the exclusive representative pursuant to Article 5 (commencing with Section 3544).

(m) "Supervisory employee" means an employee, regardless of job description, having authority in the interest of the employer to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees, or the responsibility to assign work to and direct them, or to adjust their grievances, or effectively recommend that action, if, in

connection with the foregoing functions, the exercise of that authority is not of a merely routine or clerical nature, but requires the use of independent judgment.

(Amended by Stats. 2012, Ch. 162, Sec. 54. (SB 1171) Effective January 1, 2013.)