



ADMINISTRATIVE PROCEDURE
SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 7640

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CATEGORY: **Personnel, Management/Supervisory Staff**

EFFECTIVE: **2-25-76**

SUBJECT: **Recruitment, Selection, Promotion, and Reassignment/Transfer of Management Employees**

REVISED: **7-25-07**

A. PURPOSE AND SCOPE

1. To outline procedures governing recruitment, promotion, and reassignment/transfer of management personnel, other than assignment to summer school positions.
2. **Related Procedures:**
 - Affirmative action policy and procedure 0100
 - Appeals procedure for management, supervisory,
and confidential employees 7113
 - Classification of management salary schedule positions 7610
 - Salary administration for site administrators 7621
 - Leadership development lists/entry-level certificated
management positions 7645
 - Substitute and acting principals and vice principals 7660
 - Evaluation of management employees 7745
 - Adverse action resulting from reductions in funding or
district programs, or administrative reorganization—
management/supervisory/confidential employees 7765
 - Adverse action based on performance or conduct,
management/supervisory/confidential employees... 7767
 - Certificated personnel allocation formula and class size, K-6
(regular education programs) 7215
 - Certificated personnel assignment formula and class size,
secondary schools (regular education programs and JROTC) 7216

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: A-3000, A-3500, A-3600, C-3000, C-3800, I-1050, I-1300, I-1340, I-1360, I-1700, I-5000, I-5500, I-7000, I-7001, I-7500; Program for Site Management Selection and Leadership Development, 4-10-84.
2. **District Policy.** It is the policy of the Board of Education to employ and assign to management positions the most highly-qualified individuals available (Board Policy I-7500). To facilitate this, the following general guidelines will apply:
 - a. Identification of leadership potential and development of personnel for leadership positions are among the prime responsibilities of management.

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- b. Employees interested in management assignments should demonstrate individual initiative by taking necessary steps to qualify themselves for such placement.
- c. Participation in leadership development programs shall be encouraged for all employees with identified interest in and potential for leadership position assignments.
- d. Qualified individuals with professional experience outside the San Diego Unified School District will be given an opportunity to apply for management vacancies. Out-of-district applicants will be required to meet similar minimum qualifications and job requirements as applicants from within the district.
- e. When required, temporary, interim, or acting appointments to management positions should continue only for the length of time necessary to carry out an effective recruitment, screening, and appointment process. Acting or interim managers will not be precluded from being considered for promotion while on "acting" or interim status. Acting or interim appointments (more than 90 workdays) will be filled by the manager of the department or school with approval by the superintendent.
- f. Primary responsibility for selection of candidates to fill management vacancies lies in the division in which the vacancy exists, subject to final approval by the superintendent, and appointment by the Board of Education. In special circumstances, the superintendent may promote, transfer, or reassign current managers or hire into a given position in lieu of the selection process for reasons of organizational needs, performance, length of time in current assignment, and/or degree of specialization, when in his/her judgment it is in the best interest of the school district.
- g. A reassignment and transfer process for management employees shall be established, with the major goal of placing each individual in the assignment in which he/she can be most effective. To the extent compatible with district needs, preferences of the individual management employee and immediate supervisors concerned shall be considered in implementing reassignments and transfers.

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- h. Employees who are promoted or transferred to a new management position will be expected to remain in their new assignment for a minimum of one year. (Individuals may apply within the year for assignments that will commence the following year.) Managers reassigned at the district's initiative will not be precluded from applying or being considered for promotion or transfer.
- i. In determining reassignments/transfers, promotions, and reduction in force, consideration shall be given to appraisal of the individual's demonstrated performance in previous assignments, special skills and qualifications, and requirements of the assignment for which he/she is being considered.

C. GENERAL

- 1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resource Services Division, Administrative/Operational Support.
- 2. **Definitions**
 - a. **Management employee:** An employee in a position designated by the Board of Education as a management classification compensated on the Management Salary Schedule or the Site Administrator Salary Schedule.
 - b. **Management classification:** A grouping of management positions with similar characteristics, duties, and responsibilities and having the same class title and class description.
 - c. **Management salary grade:** The established salary range for management classifications, based upon a position classification review.
 - d. **Promotion** (for purposes of this procedure): Movement from a nonmanagement to a management classification, or from one management classification to a higher-level management classification, *and* involving increased compensation (e.g., from vice principal to principal).
 - e. **Transfer:** A voluntary, usually lateral, move from one site/program to another site/program, *or from one position class to a similar position class involving no change in compensation.*
 - f. **Reclassification:** A change in classification level of a position based upon a classification review.

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- g. **Reduction in force:** An instance in which it becomes necessary to reduce the number of positions because of significant reductions in funding and/or district programs. An affected employee may be reassigned to a position in a lower salary grade or to a reduced work year, or may be laid off. (Procedure 7765)
- h. **Reassignment:** A district-initiated move from one classification to a different classification at a lower salary grade.
- i. **Reassignment due to reduction in force or management reorganization:** A change of assignment (due to reduction in force or reorganization) to a position with a lower salary range maximum on the same or different salary schedule, or to a reduced work year. Reassignment to a job class on any other district salary schedule will involve salary placement and continued employment in accordance with rules and regulations of the schedule to which the employee is reassigned.
- j. **Demotion for reason of performance:** Movement to a lower management classification and salary grade, to a site administrator position with a lower maximum step placement, or to a nonmanagement position, voluntary or involuntary, for reasons of performance, and resulting in a lower level of compensation. Salary placement for employees paid on the Management Salary Schedule shall be to the same rate if it appears in the lower salary grade; if the same rate does not appear, salary placement shall be to the closest lower rate in the lower salary grade. Salary placement for employees paid on the Site Administrator Salary Schedule shall be to the same rate if it does not exceed the maximum step placement for the new assignment; otherwise, salary placement shall be to the maximum step placement for the new assignment.
- k. Transfer to a position in a lower salary grade due to opening of new school: A voluntary change of assignment for a principal (in order to open a new school) to a position with a lower maximum step placement. Such transfer of a principal will be accomplished by freezing the principal's monthly salary for the first full year of the new school's operation. After the first full year of operation, the principal will be paid the lesser of the current salary or the maximum step placement for the position.
- l. **Interim assignment:** An assignment used to provide for a short-term replacement or a special assignment of limited duration, *not to exceed one (1) year.*

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3. **Identification, Publication, Recruitment, and Selection Process**

- a. **Human Resource Services Division** shall consult with the appropriate division head to determine position vacancies. Human Resource Services Division shall be responsible for coordination with other divisions in publicizing vacancies and encouraging eligible applicants to apply. All management vacancies shall be publicized by announcements circulated internally and externally. The Human Resource Services Division shall take responsibility for outside recruitment. Managers will be responsible for checking the district web site or for calling to find out about promotional posted vacancies during the summer.
- b. **Human Resource Services Division** shall be responsible for establishing minimum qualifications for each position vacancy in cooperation with the division or department concerned. Minimum qualifications shall be those required to perform duties and responsibilities of the position as stated on the official district job description. Position qualifications also may specify desirable site specific qualifications to be considered by the screening or interview panel in order to ensure selection of personnel with outstanding management experience, training, or potential.
- c. **The purpose of screening and interview panels** shall be to review qualifications of applicants in regard to position specifications established for a vacancy and published in the position vacancy announcement.
- d. **The screening panel** shall be responsible for reducing the number of applicants when required because of the large number of applicants. The screening panel shall reduce the number of applicants to those who clearly demonstrate from their background, experience, and training that they should be considered in the final selection process.
- e. **The interview panel** shall reduce the number of finalists for final consideration by the superintendent or division head. Unless specifically requested, the interview panel shall not provide a rank order of candidates but only a final unranked select list of two, three, or more finalists. The results of interview panel shall be reviewed by the division head and forwarded with his/her recommendation to the Human Resource Services Division for transmittal to the superintendent.
- f. **Human Resource Services Division** shall be responsible for establishing an appropriate selection process for filling position vacancies.

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- g. **A member of the Human Resource Services Division staff** will work with each screening and interview panel to ensure that all provisions of the management selection procedures have been carried out. This staff member shall assist the chair of each panel (normally the division, department, or section head of the unit to which the position is assigned) with details of the screening and interview process.

D. IMPLEMENTATION

1. Identification, Publication, Recruitment, and Selection for Management Vacancies Other Than Site Management Positions

a. Division/department head or designee

- (1) Identifies and verifies that vacancy exists.
- (2) Obtains, completes, and returns "Packet to Request Announced Vacancy" (E.2.), including:
 - (a) Completion of "Personnel Action Request" form.
 - (b) Preparation of a draft "Vacancy Announcement".
 - (c) Recommendations for screening and interview panel membership.
 - (d) Recommendation for screening criteria.
 - (e) Proposed questions for use by interview panel (questions are developed by the Human Resource Services Division in consultation with appropriate division head).
 - (f) Designation of a division manager who will serve as chair/facilitator of the panel and will coordinate with the Human Resource Services Division.

b. Human Resource Services Division

- (1) Reviews vacancy announcement; establishes application deadline date in concert with appropriate division; routes announcement for approvals, and distributes finalized announcements.

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- (2) Advertises position and receives all applications; prescreens all applications for minimum qualifications; notifies all unqualified applicants.
- (3) With appropriate division, determines whether a screening panel should be appointed.
- (4) If a screening panel is appointed:
 - (a) Sets up panel.
 - (b) Determines screening criteria with division/department head.
 - (c) Provides panel with orientation and screening materials.
- c. **Screening panel** (instructional leaders or designees serve as screening panel for site management vacancies)
 - (1) Uses established criteria to determine applicants to be interviewed (C.3.d.).
 - (2) Forwards screening results to the Human Resource Services Division.
- d. **Division/department head** reviews results of screening; with the Human Resource Services Division, determines candidates to be interviewed.
- e. **Human Resource Services Division**
 - (1) Notifies applicants of results of preinterview screening.
 - (2) Sets up interview panel based on recommendations of appropriate division.
 - (3) With appropriate division office, provides orientation to interview panels.
 - (4) Schedules interview times and notifies applicants.
 - (5) Prepares interview packets for panelists.

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- f. **Division/department head** recommends interview questions to be used; participates in interview panel to determine finalists for recommendation to division head and/or superintendent.
- g. **Human Resource Services Division**
- (1) Compiles interview results; provides results of interview panel to appointing authority for review and interview of top two to five finalists.
 - (2) Sets up superintendent's interview panel if appropriate for director level and above positions.
 - (a) Schedules and notifies applicants of interview times.
 - (b) Determines questions to be used in interviews, selecting from those recommended by appropriate division; prepares interview packets for panelists.
 - (c) Conducts reference checks as appropriate.
- h. **Division/department head or designee** interviews finalists for positions below director level; makes selection for recommendation to superintendent and Board of Education.
- i. Division/department head or designee conveys to the superintendent the name of his/her recommended candidate for director level and above positions. The superintendent *may choose to interview or may approve without interview.*
- j. **Human Resource Services Division** completes "Personnel Appointment Information Packet" (E.3.) for recommendation to Closed Session and Open Session, except for sections requiring completion by division/department head.
- k. **For recommendations to Closed Session**
- (1) **Human Resource Services Division** takes recommendations to Closed Session. (Prior to taking recommendations to Closed Session, determines whether or not candidate will accept position at the designated salary.)

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(2) **Division/department head** calls successful candidate and unsuccessful finalists immediately after board approval in Closed Session .

1. **For recommendations to Open Session**

(1) **Human Resource Services Division** prepares board agenda item "F.4." for Open Session appointments.

(2) **Superintendent** presents appointment recommendation at Open Session board meeting.

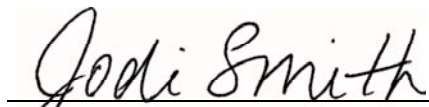
m. **Human Resource Services Division.** Makes official contact with all finalists; sends written notice to successful and unsuccessful out-of-district candidates within one week.

E. FORMS AND AUXILIARY REFERENCES

1. Administrator Request for Transfer/Reassignment, available from the Human Resource Services Division
2. Packet to Request Announced Vacancy, available from the Human Resource Services Division
3. Personnel Appointment Information Packet, prepared by the Human Resource Services Division for presentation to the Board of Education

F. REPORTS AND RECORDS

G. APPROVED BY



Chief of Staff
For the Superintendent of Schools