

BARRE SUPERVISORY UNION  
REGULAR BOARD MEETING

Barre Supervisory Union  
Conference Room  
120 Ayers St., Barre, VT

May 10, 2016  
6.00 p.m.

AGENDA

1. **Call to Order**
2. **Additions or Deletions to the Agenda**
3. **Public Comment**
4. **Approval of Minutes**
  - 4.1 Regular Meeting - April 12, 2016
5. **New Business**
  - 5.1 Transportation STA Bid
6. **Old Business**
  - 6.1 Update on Facility Director Position
  - 6.2 Update on Organizational Structure
  - 6.3 Update on Supervisory Union Building Renovations
  - 6.4 Update on Tri-Board Retreat Planning
  - 6.5 Supervisory Union Board Meeting Schedule
  - 6.6 Sub Pay
7. **Other Business as Needed**
8. **Reports to the Board**
  - 8.1 Superintendent
  - 8.2 Committee Reports
9. **Executive Session (if needed)**
  - 9.1 Personnel
10. **Adjournment**



Reminders:

Next Supervisory Union #61 Board Meeting:  
Next Barre City School Board Meeting:  
Next Spaulding High School Board Meeting:  
Next Barre Town Elementary School Board Meeting:

June 14, 2016  
June 13, 2016  
June 2, 2016  
May 11, 2016 (Executive Session)

## **BARRE SUPERVISORY UNION BOARD**

### **BOARD MEETING NORMS**

- ~ Keep meetings short and on time**
- ~ Honor the board's decisions**
- ~ Stick to the agenda**
- ~ Everyone gets a chance to talk before people take a second turn**
- ~ Keep remarks short and to the point**
- ~ Respect others and their ideas**

**BARRE SUPERVISORY UNION #61 SCHOOL DISTRICT  
REGULAR BOARD MEETING  
Barre Supervisory Union – Conference Room  
April 12, 2016 - 6:00 p.m.**

**MINUTES**

**BOARD MEMBERS PRESENT:**

Chad Allen (BT) - Chair  
Giuliano Cecchinelli, II (BC) – Vice Chair  
Joe Blakely (SHS) - arrived at 6:13 p.m.  
Kristin McCarthy (BT)  
Carlotta Perantoni (SHS)  
Tyler Smith (BC)  
Sonya Spaulding (BC)

**BOARD MEMBERS ABSENT:**

Brenda Buzzell (BT)  
J. Guy Isabelle (SHS) - Clerk

**ADMINISTRATORS PRESENT:**

John Pandolfo, Superintendent  
Donald McMahon, Director of Special Services – departed at 6:22 p.m.

**GUESTS PRESENT:**

Video Vision Tech

**1. Call to Order**

The Chair, Mr. Allen, called the Tuesday, April 12, 2016, meeting to order at 6:02 p.m., which was held at the Barre Supervisory Union Central Office in the Conference room.

**2. Additions and/or Deletions to the Agenda**

Additions: 5.3 Last Day of School for 2015 /2016 Academic Year  
6.4 Update on Facilities Director Position  
6.5 Substitute Pay

**3. Public Comment**

None.

**4. Approval of Minutes**

**4.1 Approval of Minutes – March 24, 2016 Regular Meeting**

On a motion by Mrs. Perantoni, seconded by Mr. Smith, the Board voted 4 to 0 to approve the Minutes of the March 24, 2016 Regular Meeting. Mrs. Spaulding abstained.

**5. New Business**

**5.1 SPED Report**

A document titled 'SPECIAL EDUCATION REPORT To Barre Supervisory Board' was distributed. Mr. McMahon addressed the Board and provided an overview of the information contained in the report, including child counts, staffing (including one MSW at Spaulding), data collection, training, goals, transportation, alternative classrooms, and outside placement of students. There are currently some outside placements. The goal is for students to return to the regular classroom setting. It was noted that there is coordination of curriculum training.

**5.2 CFP Approval**

Mr. Pandolfo requested approval for submission of the FY17 Consolidated Federal Programs Grant application. On a motion by Mrs. Perantoni, seconded by Mr. Cecchinelli, the Board unanimously voted to approve submission of the FY17 Consolidated Federal Programs Grant application.

**5.3 Last Day of School for 2015 / 2016 Academic Year**

A copy of the 2015 / 2016 School Calendar was distributed. Mr. Pandolfo advised that his recommendation is to hold the last student day on Monday, June 13, 2016. Board members advised regarding their preference for the last student day. On a motion by

Mrs. Perantoni, seconded by Mr. Smith, the Board unanimously voted to keep June 10, 2016, as the last scheduled student school day, contingent on no loss of academic days between now and that date, and to have Monday, June 13, 2016 utilized as a staff make-up day.

## **6. Old Business**

### **6.1 Act 46 Update**

Mr. Pandolfo advised that a Barre City Representative has resigned and there is now an official opening for a Barre City Representative. The opening will be advertised. The next meeting of the Act 46 Study Committee will be held on Thursday, April 28, 2016 at 5:30 p.m. in the Spaulding High School Library.

### **6.2 Second Reading Grade Advancement: Retention, Promotion, and Acceleration of Students Policy (G9)**

A copy of the policy was distributed.

On a motion by Mrs. Perantoni, seconded by Mr. Cecchinelli, the Board unanimously voted to approve the Second Reading of the Grade Advancement: Retention, Promotion, and Acceleration of Students Policy (G9). It was noted that commonality of policy amongst the schools would be beneficial. Administrative teams should review procedural handbooks for information pertaining to the administration of Grade Advancement policies. Mr. Pandolfo will coordinate this effort.

### **6.3 Tri-Board Retreat Planning**

The meeting has been scheduled for June 21, 2016, from 5:30 p.m. until 8:00 p.m. Extensive discussion ensued regarding the agenda. Various possible agenda items, including goal setting/vision, public engagement/communication, and the Continuous Improvement Plan will be discussed at the individual board levels. Mr. Pandolfo will contact Val Gardner regarding availability for facilitation of the meeting. The Tri-Board Retreat Agenda will be discussed/finalized at the May SU Board Meeting.

### **6.4 Update on Facilities Director Position**

Mr. Pandolfo advised that the job description has been written and the open position should be advertised within the next week. HR will create a specific timeline regarding the hiring process. Dependent on how much Board involvement is desired, a special meeting may be necessary. The meeting, if necessary, will tentatively be scheduled for May 17, 2016 at 6:00 p.m., with a fall back date of May 31, 2016. Mr. Pandolfo hopes to present a recommendation at the June meeting.

### **6.5 Substitute Pay**

A document titled 'Vermont Sub Rates' was distributed. Brief discussion was held. The information will be discussed and digested at the individual board levels. Mr. Pandolfo will bring this topic back, with additional analysis, at the May Board meeting.

## **7. Other Business as Needed**

None.

It was noted that the next SU Board meeting will tentatively be slated for May 10, 2016. There will not be a meeting on June 14, 2016, as a retreat will be held on June 21, 2016.

## **8. Reports to the Board**

### **8.1 Superintendent**

A copy of the Superintendent's report dated April 12, 2016 was distributed for review and discussion. The extensive report included information pertaining to; the Superintendent's Office, the Business Office, Curriculum, Special Services, Technology, Early Education, and Human Resources (including reorganization, recruiting, organizational structure/design, and employee relations). A copy of the BSU Expense Budget Status Report was also distributed. Additionally, Mr. Pandolfo provided a brief overview of the new Technology plan required by the State (Digital Learning Plan), copier leases, the negative impact of burdensome requirements of the Universal Pre-K Act, the automated Substitute System (for time sheet management and acquisition of substitutes), transportation bids (will be presented at the May meeting), and employee relations issues (which may be increasing as employees become aware of the newly created HR Coordinator).

### **8.2 Committee Reports**

Policy Committee – the SU Policy Committee Meeting for April falls within the week of April vacation and will not be held. Mr. Pandolfo will be touching base with the BTMES and SHS Policy Chairs. The BCEMS Chair will be appointed in the near future. A copy of the committee meetings schedule has been distributed to each Board.

## **9. Executive Session as Needed**

### **9.1 Personnel**

A personnel issue was proposed for discussion in Executive Session.

**On a motion by Mrs. McCarthy, seconded by Mr. Smith, the Board unanimously agreed to find that premature general public knowledge of the item proposed for discussion would clearly place the Barre Supervisory Union at a substantial disadvantage should the discussion be public.**

**On a motion by Mrs. Spaulding, seconded by Mrs. Perantoni, the Board unanimously voted to enter into Executive Session at 7:47 p.m. under the provisions of 1 VSA section 313 to discuss the items proposed for discussion.**

Mr. Pandolfo was invited to join Executive Session.

The remaining information was provided by the Superintendent.

**On a motion by Mrs. McCarthy, seconded by Mrs. Spaulding, the Board unanimously voted to exit Executive Session at 8:50 p.m.**

**10. Adjournment**

**On a motion by Mrs. Perantoni, seconded by Mrs. Spaulding, the Board unanimously voted to adjourn at 8:51 p.m.**

Respectfully submitted,  
*Andrea Poulin*

**DRAFT**

5.1

Barre Supervisory Union

TRANSPORTATION BID FORM

THREE YEAR CONTRACT with 2 year option to extend  
5 YEAR OLD or NEWER BUSES

BID OPENING: April 13, 2016 at 9:00 am-Central Office

TO: Barre Supervisory Union

FROM: Student Transportation of VT (Carrier)

DATE: 4/13/2016

*BAK*  
*GM*  
*Re account of 4/13/14*  
*20*

The undersigned proposes to provide transportation for the school children to and from the public schools in the towns of Barre Town and Barre City for a three (3)-year period commencing July 1, 2016 and continuing through June 30, 2019 for the sum of:  
(Annual amounts based on estimated routes and 180 operating days)

	# of Routes	Base Contract			Extension	
		2016-17	2017-18	2018-19	2019-20	2020-21
<b>Barre City</b>						
Barre City Regular AM/PM routes (includes 4.5 hours paid driver time per day)	8	414,216	428,714	443,719	454,811	466,182
Barre City Special Education (includes 8 hours paid driver time per day) <i>BC 7-</i>	1	74,835	77,454	80,165	82,169	84,223
Barre City Pre K (2.5 hours)-Per bus per day	2	93.75	97.03	100.43	102.94	105.51
<b>Barre Town</b>						
Barre Town Regular AM/PM routes (includes 4.75 hours per day)	8	434,578	449,788	465,530	477,169	489,098
Barre Town Mid-Day/Pre K (2.0 hours)-Per bus per day	3	75.00	77.69	80.34	82.35	84.41
<b>Spaulding Special Education</b> <i>51355</i>						
Special Education Wheelchair Bus (includes 4 hours paid driver time)-Per Day		285.31	295.30	305.63	313.27	321.10
Special Education Mini-Van (includes 4 hours paid driver time)-Per Day		275.31	284.95	294.92	302.29	309.85
<b>Miscellaneous Transportation Bid</b> <i>49655</i>						
Cost for hours exceeding those indicated above (per hour)		34.50	35.70	36.95	37.85	38.80
Field Trip/Extra Curric (Driver wait time cost per hour)		\$ 24.50	\$ 24.75	\$ 25.75	\$ 26.50	\$ 27.25
Field Trip/Extra Curric (cost per mile-terminal to terminal)		\$ 2.45	\$ 2.50	\$ 2.60	\$ 2.65	\$ 2.70
Trip Minimum		\$ 109	\$ 112	\$ 116	\$ 119	\$ 122

Mountain Transit  
19 Precast Rd.  
P.O. Box 553  
Milton, VT 05468  
(802) 893-1334



Bet-Cha Transit  
202 Mainelli Rd.  
Middlebury, VT 05753  
(802) 388-7800

**STUDENT TRANSPORTATION OF AMERICA®**

Lisa Perreault  
Business Manager  
Barre SU  
120 Ayers Street  
Barre, VT 05641

April 13, 2016

Dear Lisa,

I would like to thank you, for this opportunity to bid on the school bus transportation services for the Barre Supervisory Union. I am in hopes your invitation will allow us to continue to service the Barre Supervisory Union and provide your children with quality School Bus Transportation services. The attached proposal is made in good faith without collusion or connection of any other bidder or obligation to any undisclosed persons or firms.

The following costs are all inclusive and provide safe, dependable, modern school bus services at an affordable cost. We have adhered closely to all specifications and our proposal meets or exceeds the specifications in several areas. Costs are all inclusive and provide for (8) 2014 77 passenger route buses and (1) 30/3WC bus in Barre City. (8) New 2017 77 passenger route buses in Barre Town. (2) 2016 Spaulding trip buses, (5) New 2017 Spaulding special needs buses in various sizes and configurations, and (2) New 2017 77 passenger spares.. All buses would be equipped with seatbelts (Excluding Barre City), digital cameras, and 2 way radios for communications with our local dispatch and maintenance office which is located at 185 Ferno Road, Williamstown, VT.

We believe we could eliminate as many as two regular route buses from Barre Town transportation system by utilizing existing daily route buses which would provide considerable savings to the Supervisory Union.

Our name "Student Transportation of Vermont Inc." is the combination of two very old Vermont school bus companies with outstanding histories. Our company is the consolidation of two Vermont companies, Bet-Cha Transit, Middlebury, VT, and Mountain Transit, Milton, VT. all of which operate under our parent company Student Transportation of America.

Both have well over 30 years of service to our communities. We currently maintain and operate a fleet of almost 300 buses throughout Vermont and over 500 in New Hampshire. To retain quality drivers, mechanics and staff we provide competitive wages, bonuses and benefits to our employees. Throughout the years we have received many safety, maintenance and community service awards. Recently one of our supervisors was honored in the nation wide School Bus Fleet Magazine. This same magazine has previously recognized us as National Contractor of the year.

**"It's not just a Bus - IT'S US"**

We are presently under contract or in service agreements with over 70 school districts and organizations (see attached list). I invite you to contact any or all of these organizations. All past and present contracts are now and have been serviced in full compliance of all agreements.

To support our communities and improve safety we also belong to, and are very active in many professional and safety organizations. We strongly believe in giving back to our communities with support to programs like Vermont Special Olympics, Vermont Children's Hospital, Shriner's Hospital, Local Senior Groups, National Honor Society, Rotary, Make A Wish and Project Graduation. We recently received a recognition award from Camp-Ta-Kum-Ta for almost 20 years of donated transportation services to their children fighting cancer. We truly cherish this award and honor

**We care about safety, we care about our communities and we care about our kids.**

Our management team has over 200 years of bus transportation experience. Every driver is highly trained and receives ongoing safety training. We maintain a modern day fleet and conduct periodic safety inspections. Over the years our maintenance staff received the highest safety ratings from the Department of Defense, the Department of Transportation and the Vermont Department of Motor Vehicles.

In review of the attached customer listing you will see that we are very experienced in servicing Vermont. I feel the opportunity to continue our growth in Vermont will honestly be a win, win situation for all. If awarded the contract we will extend every possible effort to retain your present drivers and make the transition as seamless as possible. We truly are an equal opportunity employer and provide wages and benefits that are above the average for this area. Student Transportation of Vermont's philosophy is one of providing quality customer service with the professional drivers, operating safe, modern equipment at an affordable cost to the taxpayers.

**Our business is School Bus Transportation.**

We are very proud of our reputation and would sincerely welcome any opportunity to meet with yourself and or the School Boards to discuss our proposal and discuss any questions or concerns they may have with allowing us to provide your school bus transportation services.

Sincerely,



Brian S. Hemenway  
General Manager

**Barre Supervisory Union District #61**

**Fuel Adjustment Clause**

An adjustment will be implemented only when there is greater than a 5% variation from the base price of fuel. It is agreed that if, during the life of the contract, the price of fuel varies by more than 5% from the March 14, 2016, New England "On-Highway Diesel Fuel Price" per gallon of \$2.20 plus \$0.30 (total base price of \$2.50, which can be found at [www.eia.gov/petroleum/gasdiesel](http://www.eia.gov/petroleum/gasdiesel)) the school district will be invoiced or credited for the difference.

The fuel adjustment will be based on actual gallons consumed calculated by dividing the average daily route miles by 7.0 miles per gallon. Route miles are defined as miles driven to transport students on AM/PM routes, late buses and mid day transportation; not including field/athletic trips.

**EXAMPLE:**

582 route miles/day divided by 7.0 MPG = 83.1 Daily Gallons  
\$2.50/gallon = Base Price

If the monthly price of fuel (per the index above) averages below \$2.375 per gallon, the contractor owes the School Dept:

$\$2.375 - \$2.20 = \$0.175$  decrease x 83.1 Gallons =  $\$14.54$  x monthly operating days

If the monthly price of fuel (per the index above) averages above \$2.625 per gallon, the School Dept. owes the Contractor:

$\$2.95 - \$2.625 = \$0.325$  increase x 83.1 Gallons =  $\$27.00$  x monthly operating days

The contractor will provide the School District with a monthly invoice detailing the above formula indicating either a charge or a credit to the District.

The price of fuel for March 14, 2016 of \$2.20 (New England "On-Highway Diesel Fuel Price" per gallon) plus \$0.30 = \$2.50 (this is the Base Fuel Price for the duration of the contract). The price of fuel to determine the adjustment will be the average of the weekly fuel prices posted for the month.

**Bus Equipment In Bid Submittal**

Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	77	Diesel	Route
Barre City	2014	30+3	Diesel	Route
Spaulding Trip	2016	77	Diesel	Activity
Spaulding Trip	2016	77	Diesel	Activity
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Barre Town-new	2017	77	Diesel	Route
Spaulding Sped	2017	12+2	Gas	Route
Spaulding Sped	2017	12+2	Gas	Spare
Spaulding Sped	2017	7	Gas	Route
Spaulding Sped	2017	7	Gas	Route
Spaulding Sped	2017	7	Gas	Route
Barre Town-Spare	2017	77	Diesel	Spare
Barre City-Spare	2017	77	Diesel	Spare

## Reference List

Milton Town School District: Don Johnson, BM 802-893-3210 x1109

Orange North SU: Chris Locarno, BM 802-422-5818

Windsor Southeast SU: Ed Connors, BM 802- 674-2144 x 104

Montpelier School District: Ciny Rossi, BM 802-223-9796

**TRANSPORTATION WORKSHEET FOR 23 VSA SECTION 4(34)**

<b>SCHOOL</b>	<b>Private Contractor/Type of Vehicles</b>	<b>Number of Vehicles</b>	<b>Miles Traveled this School Year</b>	<b>Cost/Contract Price</b>
Barre Town	Type I Vehicles	10	93,600	<i>See Attached Pricing Sheet</i>
	Type II Vehicles			
Barre City	Type I Vehicles	9	82,800	
	Type II Vehicles			
<b>TOTALS</b>		<b>19</b>	<b>176,400</b>	<b>\$0.00</b>

**Barre Supervisory  
Union**

**TRANSPORTATION BID  
FORM**

**THREE-YEAR CONTRACT with 2 year option to extend  
5 YEAR OLD or NEWER BUSES**

**BID OPENING: April 1, 2016 at 9:00 am-Central Office**

**TO:** Barre Supervisory Union

**FROM:** Student Transportation of VT (Carrier)

**DATE:** 4/13/2016

The undersigned proposes to provide transportation for the school children to and from the public schools in the towns of Barre Town and Barre City for a three (3)-year period commencing July 1, 2016 and continuing through June 30, 2019 for the sum of:

**TRANSPORTATION TO/FROM SCHOOL (Including Preschool Program) for shared buses:**

**ANNUAL BID PRICE**

NUMBER OF STUDENT DAYS	SCHOOL	# OF ROUTES	# OF MILES	180	180	180
				2016-2017	2017-2018	2018-2019
	Barre Town	17	104,749	<i>See Attached pricing sheet</i>		
	Barre City	11	82,800			
<b>TOTALS</b>		<b>28</b>	<b>187,549</b>			

Two Year  
Extension:

**ANNUAL BID PRICE**

NUMBER OF STUDENT DAYS	SCHOOL	# OF ROUTES	# OF MILES	180	180
				2019-2020	2020-2021
	Barre Town	17	104,749	<i>See Attached</i>	
	Barre City	11	82,800		
<b>TOTALS</b>		<b>28</b>	<b>187,549</b>		

**TRANSPORTATION BID FORM  
THREE-YEAR CONTRACT with 2 year option to extend**

**5 YEAR OLD or NEWER BUSES**

**MISCELLANEOUS TRANSPORTATION BID  
FORM**

Field trip-extra curric	Type I	<i>* See Attached Pricing Sheets</i>				
Field trip-extra curric						
Field trip-extra	Driver costs per hour					
Special Services	SHS - BT BC					

**TRANSPORTATION BID  
FORM**

**THREE-YEAR CONTRACT with 2 year option to extend  
5 YEAR OLD or NEWER BUSES**

**Other Bid Items**

- a. The above bids are based on a current wholesale price of fuel of \$ \_  
See attached Fuel Adjustment per gallon as quoted from \_  
Clause wholesaler.
- b. Identify the number of buses on a daily basis available at terminal for field trips, co- curricular, and emergencies 4.
- c. Identify the number of drivers on substitute payroll list for transportation purposes  
6.
- d. Costs associated with video camera installation and monitoring would be  
\$ 1,000 per bus as a one time startup cost.
- e. Please complete list of equipment used in submitting the bid.
- f. Attach a list of references, contact names and telephone numbers for 3 school districts of like size.
- g. Please include an insurance binder from your bonding company.  
ON File at SU

**NOTES:**

1. The Bidder ensures that costs submitted reflect all information provided on Request for Proposal. To the extent this RFP does not provide all relevant information, it is the Bidder's responsibility to inquire with BSU to obtain any additional information it deems necessary.
2. Bidder agrees that this bid shall be valid and may not be withdrawn for a period of 90 calendar days after the scheduled closing time for receiving bids. Bidders shall be legally bound by its bid if accepted without modification by BSU.
3. This proposal must bear the written signature of the bidder. If the bidder is a partnership, the proposal must be signed by a partner. If the bidder is a corporation, the proposal must be signed by a duly-authorized officer or agent of such corporation.

**TRANSPORTATION BID FORM**  
**THREE-YEAR CONTRACT with 2 year option to extend**  
**5 YEAR OLD or NEWER BUSES**

Respectfully submitted,

Date: 4/13/2016

Student Transportation of Vermont  
Name of General Bidder

By:   
(Signature)

General Manager  
Title

185 Ferno Road  
Business Address

Williamstown VT 05679 802-433-5144  
City and State                      Zip Code                      Phone #                      Fax #

**SUBMIT BIDS by March 31<sup>st</sup> TO: Barre Supervisory Union, 120 Ayers St., Barre, VT 05641**

BSU reserves the right to reject any or all bids. BSU reserves the right to renegotiate pricing with selected vendors for alternate transportation needs as part of the final contract.

# First Student

First Student Inc.  
Location 11782  
1234 US RT 2  
Berlin, VT 05602  
Tel (802)229-4404  
Fax (802)229-1817

April 13, 2016

To: Barre Supervisory Union District #61  
Lisa Perrault, Business Manager  
120 Ayers St.  
Barre, VT 05641

*Received  
4/13/16  
JP*

First Student appreciates being given the opportunity to participate in your Bid For School Bus Transportation for the Barre Supervisory Union District #61. We are unable at this time to present a bid, but we do request to remain on your bidders list in order to be notified of any future opportunities as they arise.

We would greatly appreciate receiving the results of this bid, in order to keep our files current. If possible please email copies of the pricing pages submitted by all bidders.

First Student appreciates your request for proposal. Any further requests can be directed to the above location or [Jennifer.mitchell@firstgroup.com](mailto:Jennifer.mitchell@firstgroup.com)

Sincerely,

Jennifer Mitchell  
First Student



**Barre Supervisory Union Facilities Director Hiring Process and Timeline**

**Committee Structure and Charge:**

This Search Committee is charged with conducting the first round of candidate interviews and determining one to three viable candidates for the position. If there are more than three viable candidates, the search committee will determine the best three for board interviews. This ten-person committee will consist of:

- Paul Belisle (BTMES Day Maintenance Leadsman)
- Lloyd MacCormack (BCEMS Utility/Groundsworker)
- Andre Dessireau (SHS Maintenance Coordinator)
- Scott Griggs (CVCC Assistant Director)
- James Taffel (BCEMS Principal)
- Tim Crowley (BTMES Principal)
- Luke Aither (SHS Assistant Principal)
- Lisa Perreault (BSU Business Manager)
- Carol Marold (BSU Human Resources Director)
- John Pandolfo (BSU Superintendent)

**Candidate Pool**

As of May 4, 11 people have submitted applications

**Timeline**

1. May 11, 2016; First round interviews conducted by the Committee
2. May 17, 2016 (with May 31, 2016 alternate date); Board interviews, Superintendent's recommendation to the School Board

6.6

Vermont Sub Rates

District	School District	Teachers	Licensed	LT	Licensed LT/Para	Bus Driver	Interventionist	Nurse	Support Staff
10	Milton	\$84.00	\$75.00	\$85.00	\$100.00	\$65.00	\$65.00	\$20.00/Hour	\$9.80
11	St. Johnsbury	\$84.00			\$72.00				
13	Chittenden Central	\$80.00	\$100.00	None	\$80.00	\$15.82	\$20.00/Hour	\$235.95	\$14.08
14	Chittenden South*	\$12.86/hour		Per HR	\$12.86	\$21.29/hour	\$12.86	\$25.00/Hour	Per HR
16	South Burlington	\$80.00		\$85.00	\$13.07/Hour	\$16.57/Hour	\$16.07/Hour	\$200.00	
27	Bradford	\$70.00						\$100.00	
27	Thetford	\$75.00						\$100.00	
27	Waits River	\$80.00						\$125.00	
27	Oxbow	\$75.00						\$80.00	
28	Randolph	\$75.00	\$80.00		\$12-\$13			\$75.00	
29	Orange East	\$80.00			\$14-17.85			\$100.00	
29	Williamstown	\$80.00						\$100.00	
30	Orange	\$75.00							
32	U32*	\$77.50	\$92.50					\$153.50	First Step
35	Orleans	\$80.00						\$170.00	
41	Washington	\$12.10			\$11.00			Contract	
41	Plainfield	\$12.10							
43	Northfield	\$73.00		\$140.00					
45	Montpelier	\$80.00			\$203.00			\$125.00	
61	BSU - ELEM. & MIDDLE	\$73.00	\$73.00	\$108.00	\$73.00	\$73.00	\$73.00	\$145.00	\$14.50
61	BSU SHS/CVCC	\$17.50/hour	\$17.50/Hour	\$17.50/Hour	\$17.50/Hour	NA	\$17.50/Hour	\$17.50	\$17.50/Hour

61 1st Proposal	Day Sub	ED Certified	LT or Perm.	Licensed LT/PA	Bus Driver	BI	Nurse	Support Staff	Lic. Day Sub
	\$80.00	\$85.00	\$110.00	\$80.00	NA	\$80/\$85	\$145.00	\$14.50	\$90.00

4/18/2016

\*Requires ED Sub Training  
 \*\*\$82.50 w/ED Training

Current BSU Rate Notes:

A comparable day (6 Hours) at SHS = \$105.00  
 SHS may pay by hour for 3 blocks=\$78.75  
 SHS Perm. Subs are paid \$140.00  
 BCEMS Perm. Subs are paid \$110.00  
 BTMES does not have perm. subs

Our belief is that sub rates have not changes in 10+ years.

BC FY 17 \$269,900.00  
 Days at \$73 3697  
 Days at \$80 3374  
 BT FY 17 \$183,000.00  
 Days at \$73 2507  
 Days at \$80 2288  
 SHS FY 17 \$132,000.00  
 Days at \$79 1871  
 Days at \$80 1650

**BARRE SUPERVISORY UNION DISTRICT #61**

8.1

**Barre City Elementary and  
Middle School**

**John Pandolfo**  
Superintendent of Schools

**Richard McCraw, M.Ed.**  
Director of Curriculum,  
Instruction, and Assessment

**Barre Town Middle and  
Elementary School**

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Barre, VT 05641  
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**Lisa Perreault**  
Business Manager

**Central Vermont Career Center**

*Doing whatever it takes to ensure  
success for every child.*

**Donald E. McMahon**  
Director of Special Services

**Spaulding High School**

**Diane Stacy**  
Director of Technology

**Sandra Cameron, M.Ed., MOT**  
Director of Early Education

May 10, 2016

TO: The Members of the Barre Supervisory Union Board

RE: Superintendent's Report

Please accept the following report to the Supervisory Union Board:

1. Superintendent's Office

- a. Renovation work on the second floor of the SU building will not begin in the summer, as the SHS maintenance staff will have their hands full with work on the SHS-CVCC building. We expect work to take place in the late fall/early winter.
- b. We will be putting in one handicapped parking spot in the SU office parking lot. I have not yet explored in detail creating parking spots in the front of the building and will likely leave this to the new facilities director.
- c. I have now met twice for custodial/maintenance negotiations and have for more sessions scheduled between now and June 14.
- d. On June 13, all staff of the SU will meet in the SHS Auditorium to hear presentations on: (1) the transition to new VEHI Health Insurance plans in 2018; (2) an Act 46 Update and Q & A session; and (3) information on the new Aesop and Veritime leave and timesheet systems.

2. Business Office:

- a. AOE On-site Fiscal Monitoring of Federal and State Grants: On February 16, 2016 the Fiscal Monitoring Team spent the day at the BSU. Their visit involved a review of our accounting system set up, procurement practices, payment procedures, segregation of duties and fiscal controls. We recently received their findings which included minor instances of non-compliance such as the need to improve documentation of inventory tracking, need to update procurement and periodic certification forms, and development of subgrant agreements. They also reported significant improvements to the BSU's grants management system since their last visit. Their scheduled two-day visit was reduced to one day due to the evidence of progress and preparation for their visit.
- b. Update on Business Office Restructure: Reducing the business office team to two staff accountants has been challenging. With open enrollment, closing of the school year, and the preparation for the beginning of a new fiscal year the accountants are needing to work overtime to keep up with the added responsibilities and demands. As you know, the BSU is

one of the larger supervisory unions in Vermont. My observations over the past 10 months have confirmed for me the need to reevaluate job descriptions and responsibilities and address how these align with the compensation within the BSU and comparably to other organizations with similar staffing and student populations.

- c. **Auditors:** I have contacted Mudgett Jennett & Krogh-Wisner, P.C. to schedule their preliminary review of the FY16 finances. They plan to be on-site the first week in June.
- d. **Transportation Bids:** Three contractors were invited to bid on BSU transportation with only one bid submitted from Student Transportation of America. The two who did not submit a bid, respectfully declined due to current circumstances with their organizations. I have completed an analysis showing history of transportation cost for each district in comparison to moving to one unified scheme. We have invited the general manager of STA to this meeting as well as to the Barre Town School Board meeting.
- e. **VSBIT Grants:** We were awarded a \$2,500 HR Grant as well as a \$7,500 Safety Grant. We have contracted with an HR consultant and installed a new security system with a secure door access system scheduled to be installed before June 30, 2016.
- f. **RFPs:** Several projects are slated to happen over the summer at each facility. In preparation I have been working with the Facility Directors, engineer, and architect to develop RFPs. In most cases we have received the minimum three bids however, if three bids are not received we must request a waiver from the Agency of Education. We have received one to date for the SHS/CVCC Sprinkler project, and will submit a request for the transportation contract as well.

### 3. Curriculum:

- a. **It's federal grant season.** Final amendments for the current year were due on April 15th, and the application for most grants is due in the next several weeks. The good news is that our Title I and IIA money, the largest of our grants, is changing very little from last year's figure.
- b. **Federal grant money:** Part and parcel of the foregoing is a systematic reexamination of how we use our federal grant monies. Research continues as this is being written, but it does not currently appear that we will make any radical changes to our approach.
- c. **Professional development planning** is under way for next year. This year it is taking the form of a multi-day strategic planning process spanning all schools. The result will be a so-called Theory of Action that serves as an overarching direction for most of our strategic work and that will better allow us to align similar work between schools.
- d. **Report cards:** As mentioned last month, we continue to work on a common standards-based report card for the two elementary-middle schools. Simultaneously, Spaulding is working hard to identify the components and process of proficiency-based grading and the associated graduation requirements. This system is required by the state to be in place for students graduating in June of 2020. It's our goal to align the Spaulding reports with those of the other schools to the extent it's reasonable to do so.
- e. **Data:** One of our focus areas for improved practice is making more effective use of data, including student data. This figures prominently in the work of part c above, but it also requires work in the Infinite Campus system. That work is proceeding.
- f. **The Principal search** at Barre Town is proceeding, for the second time this year. Schools generally are finding that the administrator candidate pool is quite a bit shallower than it

was in the past. (One Vermont school recently had only one viable application for their principalship.) Nonetheless, we are optimistic we will be able to present solid candidates to the Barre Town School Board on May 11.

4. Special Services

- a. Special Services Directors are working on the Supervisory Union and Building Based special services director's position descriptions. The first draft will be submitted to H.R.

5. Technology:

- a. **Digital Learning Plan:** The new Digital Learning Plan required by the state of Vermont will "dovetail" with the Theory of Action Plan that is already in process. The general idea is to have technology initiatives support and enhance the existing improvement and action plans (which are designed to improve student learning) rather than creating another new set of goals. This will be the primary technology focus for May.
- b. **Infrastructure upgrades:** We are nearing the completion of the district wide project to install new network switches and WAPs in every classroom. There are more network switches to install. This work needs to be completed while school is not in session and is fairly time consuming, so most of the remaining work will be completed over the summer.
- c. **BTMES copiers:** the RFP for 2 year BTMES lease and maintenance contracts for copiers is almost ready to be sent out to vendors.

6. Early Education

- a. Final 2016-2017 enrollment nearly complete for school-based programs.
- b. Continued increase in PreK partner programs (now 7 active, 3 pending).
- c. Parent inquiry continues; estimates for FY17 tuition are 35 BSU-wide.
- d. PreK Partner meeting Th 5/5/15: review process from parent inquiry through tuition payment; introduce use of Infinite Campus to track attendance; review case scenarios to help partners prepare to answer parent questions.
- e. Internal process developed with business office for projecting tuition costs and tracking payments.
- f. "Transition to Kindergarten" visits scheduled at each school for mid-May.
- g. June inservice plans include final review of new licensing regulations and continued Curriculum Work addressing new VT Early Learning Standards.
- h. End-of-Year grant reporting underway.
- i. Interviews complete at BTMES.
- j. New Early Childhood Program Licensing Regulations go into effect Sept 1st and will require many systems changes. Much of this work will need to be done over the summer and will require collaboration from a variety of school personnel including maintenance, nursing, HR, Business Office.

7. Human Resources:

**a. Recruiting:**

- Interviews were held for the Benefits Specialist position. There were no viable candidates within our salary range. The position has been reposted as an HR Assistant/Benefits Specialist to attract a generalist with a specialization in Benefits.

- The Facilities Director position was posted on April 16th. We appear to have several viable candidates already. The Hiring Committee is in place, and our goal is to have this position filled mid May.
- The recruiting, interviewing, and selection process for the BCEMS Assistant Principal position is complete. Pierre Laflamme will be joining the BCEMS team pending board approval.
- There are 22 positions open within the District. All can be viewed on the District website.

**b. Compensation/Benefits:**

- Work continues on the contract process. The administrative contracts have been slightly revised, and are being reviewed by counsel.
- Benefit “packages” or levels are being defined in an attempt to reduce the number of different combinations of benefits currently offered to our administrators and non-contracted employees.
- Because of the concerns regarding the inconsistency of the non-contracted (“other”) employees contract and compensation process, I have begun to work with outside counsel to ensure we consistently meet FLSA guidelines in regard to our written agreements with this group of employees.
- Employees in the “other” category will be given an “at will” offer letter with an employee handbook (created, and currently in draft form) instead of a contract. This will help us to address some of our payroll/FLSA issues, and allow us to continue our work in the organizational design area throughout the year.

**c. Employee Relations**

- We continue our work to create, review and correct issues with job descriptions and organizational charts. This brings about a host of employee relations issues that need to be addressed.
- Work continues to support and advise administrators who are addressing performance, etc. issues within their areas.

**d. VSBIT BSU HR Assessment**

Report is attached.

Respectfully Submitted,

John Pandolfo  
Superintendent of Schools  
on behalf of the Barre SU Central Office Administrative Team



John Pandolfo &lt;jpandbsu@u61.net&gt;

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## 2015 Claims Data

1 message

Lisa Locke &lt;lisa@vsbit.org&gt;

Fri, Apr 15, 2016 at 1:37 PM

To: "jpandbsu@u61.net" &lt;jpandbsu@u61.net&gt;, "lperrbsu@u61.net" &lt;lperrbsu@u61.net&gt;

To: Superintendents and Business Officials

From: Laura Soares, VEHI

Attached you will find 2015 claims data for your Supervisory Union/Supervisory District organized by expense range, as well as the 2015 claims data for VEHI as a whole as a benchmark.

VEHI/BCBSVT is providing this data, as we indicated in our New Health Plan Workshops, to assist school leaders and local union leaders gain a sense of the cost of health care individuals incur in a typical calendar year. Please note:

- The data is based on VEHI membership and claims incurred in calendar year 2015,

paid through February 2016.

- This data is based on medical and pharmacy claims paid on behalf of **all** active employees

and their dependents, covered by VEHI.

- Claims amounts represent **total claim costs**, including contributions from both

subscribers/dependents and from VEHI/BCBSVT. This does not depict a member's out-of-pocket costs.

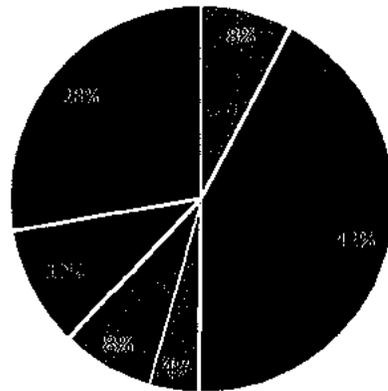
VEHI is notifying school board members that you have been provided with this information.

If you have any questions regarding the attachment, feel free to contact Laura Soares at [laura@vsbit.org](mailto:laura@vsbit.org) / 802-223-5040 x208 or Bobby-Jo Salls at [vehi2018@vsbit.org](mailto:vehi2018@vsbit.org) / 223-5040 x233.

### VEHI Active Members

EXPENSE BAND	PERCENT OF MEMBERS
NO CLAIMS	8%
\$0.01-\$1499	43%
\$1500-\$1799	4%
\$1800-\$2499	8%
\$2500-\$3999	10%
\$4000+	28%

### VEHI Membership



- NO CLAIMS
- \$0.01-\$1499
- \$1500-\$1799
- \$1800-\$2499
- \$2500-\$3999
- \$4000+

**Please note:**

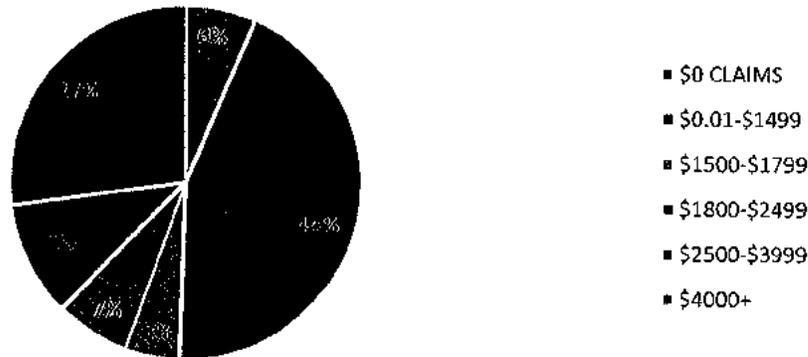
- The data above is based on VEHI membership and claims incurred in calendar year 2015, paid through February 2016.
- This data is based on medical and pharmacy claims paid on behalf of all active employees and their dependents covered by VEHI.
- Claims amounts represent total claim costs, including contributions from both subscribers/dependents and from VEHI/BCBSVT.

reporting produced 4.2.16

## Barre SU

SUPERVISORY UNION	EXPENSE BAND	MEMBERS	PERCENT OF MEMBERS
Barre SU	\$0 CLAIMS	55	6%
Barre SU	\$0.01-\$1499	377	44%
Barre SU	\$1500-\$1799	42	5%
Barre SU	\$1800-\$2499	58	7%
Barre SU	\$2500-\$3999	90	11%
Barre SU	\$4000+	232	27%
		855	

## Barre SU



**Please note:**

- The data above is based on VEHI membership and claims incurred in calendar year 2015, paid through February 2016.
- This data is based on medical and pharmacy claims paid on behalf of all active employees and their dependents covered by VEHI.
- Claims amounts represent total claim costs, including contributions from both subscribers/dependents and from VEHI/BCBSVT.

reporting produced 4.2.16

**VSBIT Self Assessment Results and Recommendations-HR Management Practices  
Conducted by Carol Marold, HR Coordinator**

**Results of Examination**

Module	Section	No. of Questions	Total Equivalent	Earned Equivalent	Average (%)	Rating
HR Management Practices	General Management	16	15	10.7	71.33	Significant Area for Improvement
	Workforce Planning	7	7	0.6	8.57	Significant Area for Improvement
	Organizational Design and Strategic Planning	9	9	6	66.67	Significant Area for Improvement
	Performance Appraisals	7	6	3.6	60.0	Significant Area for Improvement
	Orientation and Training	4	4	2.4	60.0	Significant Area for Improvement
Employee Classification, Compensation and Benefits	Compensation and Employee Classification	9	9	5.4	60.0	Significant Area for Improvement
	Benefits and Leave Management	9	9	7.6	84.44	B-
Employee Relations	Identification of Employee Relations Issues	12	11	4.6	41.82	Significant Area for Improvement
	Implementation of Policies and Communication with Employees	9	9	7.3	81.11	C+
	Employee Relations Practices and Records Maintenance	11	11	9.9	90.0	A-
	Performance Appraisals	13	13	0.6	4.62	Significant Area for Improvement
Recruitment and Selection	Planning	5	5	4.6	92.0	A
	Recruiting Job Applicants	8	7	6.4	91.43	A-

	Collecting Relevant Information and Selecting Final Applicants	10	10	6.8	68.0	Significant Area for Improvement
	Maintaining Policies and Procedures	3	3	2.35	78.33	C+
Safety, Health and Security	Management	7	6	4.45	74.17	C-
	Policies and Procedures	4	4	2.8	70.0	Significant Area for Improvement
Training and Development	Planning	12	11	10.05	91.36	A-
	Implementation	3	3	1.4	46.67	Significant Area for Improvement
	Training and Development Assessment	6	6	5	83.33	B-
	Performance Appraisals	3	3	1.9	63.33	Significant Area for Improvement

**Notes Regarding Self Assessment:**

Many of the assessment questions were answered in the positive (and skewed the overall assessment in the positive) because of the CBA's that are in place, not from overall organizational policies and procedures. Many of the training and performance module questions were answered using examples from training provided to teachers and para's through the Curriculum and Assessment Department. Again, not as a result of practices throughout the BSU for all employees.

We are uncovering basic HR required functions/tasks have not been completed in the past. HRIS (Human Resources Information Systems) functions are difficult at best. The ADS system is used only as a financial management system, and we do not have the ability to produce basic reports needed for reporting compliance. Basic internal HRIS needs/analysis requires not only manual manipulation, but significant supervision to ensure validity.

## **General Management**

1. Does your company formally document its human resources processes (e.g. recruitment and hiring, employee classification, termination and discipline procedures, etc.)? **Some processes (25-49 percent)**

Formally documenting human resources processes serves several important purposes. First, in the event of employee turnover within the human resources function, formally documented processes will provide new employees with necessary information to ensure a smoother transition of responsibilities. Second, documentation can assist in analyzing the processes in order to identify areas for improvement. Third, formally documented processes help to ensure consistent and equitable treatment of all individuals.

2. In addition to the needs of the company, are customer needs taken into account as appropriate when developing human resources policies and processes?  
**Rarely or never (less than 25 percent)**

Beyond legal compliance, human resources processes should focus on addressing the needs of a company's customers or clients—for instance, hiring employees with specialized knowledge or skills to meet customer demands or providing staff training on topics or technology of particular significance in your industry. Some of the ways of identifying customer needs include: surveying the organization's customers, conducting internal audit reviews, and receiving feedback from employees.

3. Are the company's human resources policies and practices reviewed on a regular basis to ensure their effectiveness and compliance with applicable law?  
**Less often than every five years, or never**

It is important that policies and practices be reviewed on a regular basis to ensure they are as efficient and effective as possible and are appropriately aligned with the company's mission and goals. Human resources policies and practices also must comply with various federal and state laws, such as employment discrimination and benefits-related laws. A company's procedures will need to be updated periodically to accommodate both internal changes (e.g., changes in the company's mission, staffing levels, benefits offered, etc.) and changes in the external environment (e.g., new laws, changes in the needs of the organization's customers, technological changes, etc.).

4. Does the appropriate level of management approve all policies before they are implemented?  
**Always (100 percent)**

Management approval of all human resources policies ensures those policies are aligned with the overall strategic management of the company. However, the highest level of management in the company need not approve all HR policies. Depending on the scope and impact of the policy, approval of the policy may be done by a lower level of management.

5. Do employees have access to the company's written human resources policies and procedures?

**Half employees (50-74 percent)**

Providing access to human resources policies and procedures increases the likelihood that employees will know, understand, and follow them. A clear understanding of the company's HR practices may also help to improve employee morale. In certain instances, providing employees with notice of the company's procedures may be required by law—for example, employers covered by the federal Family and Medical Leave Act (FMLA) are required to provide information about employee rights and obligations related to FMLA leave. An employee handbook is an important tool you can use to effectively communicate information regarding your company's policies, practices and employee benefits. While the policies outlined in your handbook will reflect your company's own unique culture, it is important to consider federal, state and local laws and regulations that may affect your business when drafting your employee handbook. It is prudent to have employment counsel review the handbook before distribution.

6. Are I-9 forms completed for all new employees within three business days from the first day of work for pay?

**Always (100 percent)**

The federal Immigration Reform and Control Act of 1986 (IRCA) makes it unlawful to knowingly hire illegal aliens and mandates detailed recordkeeping for all employees hired. To comply with the law, all U.S. employers must verify the identity and employment authorization of every employee hired to work in the United States after November 6, 1986 (including U.S. citizens and regardless of the employee's immigration status), by timely completing the Form I-9, Employment Eligibility Verification. Employers should ensure that the employee completes Section 1 of Form I-9 by his or her first day of work for pay. Employees may complete Section 1 of Form I-9 at any time between acceptance of a job offer and the first day of work for pay. Employers must then review the employee's document(s) and fully complete Section 2 of Form I-9 within three business days of the first day of work for pay.

7. Is a job analysis performed regularly for each existing job within your company, as well as for new positions, in order to develop accurate job descriptions, salary administration, etc.?

**No**

Each position in your company should be analyzed in order to clearly determine the nature of the duties and responsibilities of the job and the skills, education, and experience necessary to competently perform the job. A comprehensive job analysis allows an employer to more effectively determine compensation, opportunities for promotion, and similar factors, as well as guides the hiring of new employees. Evaluations should be performed for all new positions and at least every two years for existing positions.

8. Does your company maintain current, functional job descriptions that accurately describe the responsibilities and requirements of each position?

**Some positions (25-49 percent)**

A well-written job description ensures that employees understand a job's responsibilities and requirements. It is also a key resource to help you review performance, hire employees, develop recruitment advertising and make sure your compensation is competitive. Job descriptions should be based on comprehensive job analyses and should be current and accurate so employees know what is expected of them. Each job should be analyzed to determine the duties to be performed and the necessary knowledge, skills, and abilities. Positions are likely to change over time—for example, due to shifts in workload, an employee "growing" into a position, or changes in staffing—so descriptions should be reviewed and updated regularly. Be sure in developing your descriptions that your company has adhered to all federal equal employment opportunity and nondiscrimination laws (such as the Americans with Disabilities Act, for employers with 15 or more employees) and any applicable state laws.

9. Are your functional job descriptions objective?

**Yes**

Functional job descriptions should be objective and not subjective. These job descriptions should not be based on the specific knowledge, skills, and abilities of the employee currently in the position, but rather, they should be based on the duties and responsibilities of the role applicable to anyone filling that position.

10. Are employees provided relevant and accurate job descriptions?

**This information is not available to employees**

Providing job descriptions to employees allows them to better understand the employer's expectations when it comes to the responsibilities and requirements of the position, and also gives employees an understanding of the basis for assignments given to them.

11. Is there a process for employees to request a review and revision of their job descriptions?

**No**

Employees often have the best understanding of the specific duties currently being performed and the knowledge and skills needed to do the work. Additionally, jobs and responsibilities often change over time. By providing a procedure whereby an employee can request careful review of his or her job description, descriptions are more likely to accurately reflect the responsibilities and requirements of the position. Such a procedure may also decrease the risk of employee complaints (for instance, arguments that certain responsibilities are outside of an employee's job description).

12. A. Does your company have a policy outlining the proper maintenance of employee personnel files?

**No (SKIP to Question 13)**

When collecting and maintaining information to be kept in employee personnel files, it is important to comply with all applicable federal and state laws, including any requirements as to what information should be collected, confidentiality, and how long records should be kept. In certain instances, documentation in a personnel file can provide important supportive data—for example, to show an employee's discipline history in support of a termination. The personnel file can also track performance goals, leaves of absence and any employment-related agreements. Proper maintenance of employee records and files serves several important purposes. It assures compliance with the law regarding what data is appropriate to include in a regular personnel file; it assures confidentiality of employee data; and it assures quick, efficient retrieval of data as required for internal personnel decisions, as well as when requested by employees or external sources, if appropriate or required.

B. Does your policy on personnel files differentiate between items that go in the regular personnel file and items that go into a confidential personnel file?

**No**

Placing inappropriate information, such as an employee's medical information or request for reasonable accommodation under the federal Americans with Disabilities Act (ADA), in an employee's regular personnel file is unlawful and can be very costly for the employer if identified and legally challenged. In accordance with applicable federal and state laws, employers should carefully consider which documents need to be kept in a confidential file separate from the employee's personnel file, as well as who should be granted access to those records. If you have any questions regarding the confidentiality of a particular record or form, be sure to contact your state's labor department or a knowledgeable employment law attorney.

13. How does your company stay informed on current laws relevant to your workplace?  
**We learn about new laws or requirements only when a problem arises with respect to the particular matter affected.**

The regulation of the workplace has continued to expand over the last few decades. The law continues to change periodically, both with new legislation and with court decisions and new regulations. Every company should have a clear procedure for staying up-to-date with these matters and an employer should have at least one manager responsible for keeping the company informed.

14. Does your company track and analyze employee turnover data? **No**

Part of human resources planning includes estimating staffing needs. In order to do this effectively, it is necessary to identify and predict employee turnover rates for various positions within the company. A high rate of employee turnover can result in a loss of knowledge and skills, as well as have a direct impact on a company's bottom line. Some of the costs involved in employee turnover include recruiting, training and orientation; salary and benefits during

training and orientation; and lost productivity during the time in which the position is vacant and during the time in which a new employee is gaining the necessary knowledge and skills to perform at the required level. Analysis of employee turnover can provide valuable information to the company regarding training needs, compensation and benefits issues, management problems, etc.

### **Workforce Planning**

1. Does your company engage in workforce planning?

**No (SKIP THE REMAINING QUESTIONS IN THIS SECTION)**

Workforce planning is a systematic process for projecting human capital needs required to meet a company's goals, and developing the policies, strategies, and systems necessary to building a workforce that will support the growth and success of the company. An effective workforce plan is an essential tool to identify appropriate workload staffing levels and manage budget allocations so a company can meet its objectives.

### **Organizational Design and Strategic Planning**

1. A. Is the company's mission statement periodically reviewed and revised as needed?

**Yes**

A mission statement provides a written declaration of the overall direction of the company. The mission statement should be regularly reviewed and revised as necessary to accommodate changes in both the internal and external environment in which the company operates.

B. To whom is the company's mission statement communicated?

**All employees**

Because the mission statement provides the overall direction for the entire company, it is important that all employees are aware of, and familiar with, the organization's mission statement.

2. Do those employees with human resources responsibilities have a clear understanding of organizational as well as customer needs?

**No**

HR management should focus not only on external customers' needs, but also on the internal goals of the organization. The individuals who make up your company go a long way toward driving its success, whether they are employees, managers, consultants or others. Effective management of human resources is key to attracting and retaining the personnel that will help the company achieve its objectives.

3. A. Does your company have an updated, clear organizational chart?

**No (SKIP to Question 4)**

An updated and clear organizational chart provides a better understanding of the chain of command within the company and facilitates communication by clarifying reporting relationships.

4. How often is your organizational structure reviewed to determine its adequacy for the current environment in which the company operates?

**Never**

As the environment in which a company operates is likely to change over time (such as in response to legal or economic factors), it may be appropriate to modify the organizational structure in order to continue to effectively achieve the company's mission.

5. Are supervisor-employee relationships in your company clearly defined?

**Some of them (25-49 percent)**

All supervisor and employee relationships should be clearly defined and communicated so that employees understand their positions in the organizational structure and understand how their tasks contribute to achieving the company's mission.

6. To what extent does the company's degree of centralization or decentralization of management support the achievement of organizational goals and objectives?

**To a large extent (75-99 percent)**

As the environment in which a company operates is likely to change over time, it may be appropriate to modify the organizational structure in order to adapt and continue to effectively achieve the company's mission. One aspect that should be reviewed is the centralization of decision-making within the company. Depending on the scope and impact of a particular line of decision-making, it can be more effective and efficient to delegate certain decision-making authority to a lower level of management that is familiar with the overall strategic objectives of the organization.

7. Does your company have a succession plan for addressing the duties and responsibilities of key positions should they become vacant?

**No**

It is a good idea to develop inventories of the skills of key employees and to identify where other employees, either internal or external to the company, who have similar skills might be found. Whether the vacancy is anticipated or unexpected, planning ahead can help ensure a smooth transition and avoid disruption to the business.

### **Performance Appraisals**

1. Did executive management assist in developing your company's system for conducting employee performance reviews?

**Not applicable, there is currently no system for evaluating employee performance  
(SKIP THE REMAINING QUESTIONS IN THIS SECTION)**

Just as a company's human resources function should be aligned with its overall strategic goals, the system used for evaluating employee performance should also reflect the overall performance management goals of the organization. In order to ensure that performance management goals are aligned with organizational goals, the highest level of management should

assist in the development of the employee performance appraisal system.

2. Is the performance review process explained and discussed during new employee orientation?

**Rarely or never (less than 25 percent of the time)**

In order for employees to most efficiently accomplish their job tasks, they must have a clear understanding of the evaluation criteria at the beginning of the appraisal period. This provides targets and goals for the employees. If the evaluation criteria change during the appraisal period or if the employee transfers to a different position or department, the employee should be provided with the new evaluation criteria upon transfer to the new position.

3. Does the company keep track of performance review due dates and actual completion dates?

**No**

It is a good practice to track due dates and actual completion dates of employee performance reviews to ensure that appraisals are conducted regularly. Many companies conduct the performance review process once a year. Timing of the reviews may take place near the anniversary of an employee's start date or, alternatively, a company may wish to conduct reviews for all employees within the same few weeks every year.

4. Do all performance review forms require the signature of the employee being evaluated and the date?

**No**

Recording signatures and dates on all formal paperwork is a good management practice. Keep in mind that the signature of an employee being evaluated does not indicate the employee agrees with everything in the review. Rather, it indicates the employee has read and understood the appraisal and had an opportunity to discuss his or her performance with the supervisor or manager conducting the review.

5. Are performance evaluation ratings and decisions reviewed by management (human resources or otherwise) for consistency?

**No**

A centralized review of performance appraisal ratings can help to prevent some common errors in employee evaluations, such as leniency (grading all employees too high), central tendency (grading all employees in the middle), halo effect (allowing one characteristic, behavior, or result to skew the entire evaluation of an employee), and similarity error (giving higher grades to employees who are most like the evaluator).

6. Do supervisors and managers receive formal feedback on how well they have prepared and conducted performance reviews?

**Supervisors and managers receive feedback on completion of appraisals sporadically or only when requested**

Due to the importance of effective employee performance reviews, it is

beneficial for supervisors and managers to receive formal feedback on how well they have carried out performance evaluations. Some of the criteria for evaluation may include timeliness of conducting reviews, thoroughness of feedback, and completion of specific, job-related training and development plans for employees under review.

7. Are policies and procedures in place for ensuring that an employee who transfers to another position, or whose supervisor or manager leaves, receives regular performance evaluations?

**No**

If an employee transfers to a different position or department, the employee should be evaluated upon departure, or his or her new supervisor should be provided with input about the employee's performance in the previous position. Having established policies and procedures in place for when an employee transfers or when an employee's supervisor or manager departs helps ensure that employees do not go without a formal review for an extended period of time.

## **Orientation and Training**

1. A. Does your company provide new employee orientation (also called onboarding) to all employees?

**Yes**

New employee orientation (also called onboarding) introduces new employees to your workplace and your existing staff, as well as familiarizes them with some of the company's basic management practices. It also allows for formal completion of new employee paperwork. As the new employee's first major interaction with the company, it is important that orientation be informative, efficient, and dynamic. Onboarding should be conducted as soon after an employee's start date as possible. However, you also need to be careful of overloading your new employee with too much information on the first day. If you need to cover a considerable number of topics, consider extending the orientation over a second day. Another way you might organize your orientation agenda is to identify information your new employee needs to know on the first day, first week, second week, etc.

B. How many of the following subjects does your orientation cover? -New Hire Forms (Form I-9, tax forms, confidentiality agreements, etc.) -Compensation (pay periods, direct deposit, payroll deductions, etc.) -Employee Benefits (health insurance, 401(k) plan, etc.) -Attendance and Leave (hours of work, absenteeism, meal and break periods, sick leave, etc.) -Employee Performance and Conduct (performance reviews, discipline policies, grievance program, workplace harassment, etc.) -Health and Safety (safety and security procedures, workers' compensation, employee assistance programs, etc.) -Required Training (technology, skills training, safety, etc.) -General HR Practices (equal employment, Americans with Disabilities Act, office equipment, telephone and computer use, etc.)

## Four or five of the subjects

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2. A. Does your company require additional training for new supervisors and managers?  
**No (SKIP THE REMAINING QUESTIONS IN THIS SECTION)**

Required supervisory training ensures that employees who assume management roles understand the company's management philosophy and how to carry out their responsibilities in accordance with the company's basic management practices. Training for supervisors should take place as soon as possible after the employee takes on the new management position.

## Employee Classification, Compensation and Benefits

### Compensation and Employee Classification

1. Are workers properly classified by the company as either employees or independent contractors?

**No**

As an employer, it is very important that you properly classify the workers you hire as independent contractors or employees. This will affect whether the worker is entitled to benefits, how much you pay in taxes, whether you need to withhold from your workers' paychecks, and what tax documents you need to file. In determining whether a worker is an employee or an independent contractor, employers must consider all information that provides evidence of the degree of control and independence. There is no set number of factors (or any one factor) which automatically labels a worker—you must consider the entire relationship and evaluate the degree of the right to direct and control. The keys are to look at the entire relationship, consider the degree or extent of the right to direct and control, and finally, to document each of the factors used in coming up with the determination.

2. Does your company determine the exempt or non-exempt status of every position for employees within the organization?

**We do not have a method for determining employees' exempt or non-exempt status.**

Employees are "exempt" or "non-exempt" from the federal Fair Labor Standards Act (FLSA) based on their specific job duties and compensation.

Non-exempt employees are entitled to be paid the federal minimum wage for all hours worked, and overtime pay of not less than one and one-half times the regular rate of pay for hours worked over 40 per workweek. Exemptions are determined based on each specific employment situation. Job titles alone do not determine the exempt or non-exempt status of any employee. Each determination is based on the specific job duties performed and compensation received. Examples of exempt employees under the FLSA include bona fide executive, administrative, professional and outside sales employees. Failure to comply with the FLSA can expose an employer to substantial fines from the U.S. Department of Labor as well as potential claims from individual employees. Employers may also be liable for back pay and damages, depending on the specific circumstances.

3. How often are positions reviewed to ensure that employees are properly classified as exempt or non-exempt? **Less often than every five years, or never**

It is important to conduct a regular review of employee status to ensure accurate classifications, as positions can change over time. A regular review of employee classifications reduces the risk of challenges and lawsuits alleging misclassification.

4. Do you have a clear procedure for recording and paying overtime compensation? **We have no policies or procedures for recording and paying overtime compensation.**

Under the federal Fair Labor Standards Act (FLSA), non-exempt employees must receive overtime pay for hours worked over 40 in a workweek at a rate not less than time and one-half their regular rates of pay. The FLSA applies on a workweek basis. An employee's workweek is a fixed and regularly recurring period of seven consecutive 24-hour periods. It need not coincide with the calendar week, but may begin on any day. Different workweeks may be established for different employees or groups of employees. Averaging of hours over two or more weeks is not permitted. Failure to pay overtime compensation as required by the FLSA can expose an employer to substantial fines from the U.S. Department of Labor (DOL) as well as potential claims from individual employees. An employee can sue to recover overtime pay or the DOL can initiate a suit. In certain cases damages are awarded in addition to overtime wages. Employers should also check with their state labor department for additional state requirements regarding overtime pay.

5. A. Does your company have a thoughtfully defined philosophy regarding employee compensation?

**No (SKIP to Question 6)**

Every employer should determine its philosophy of compensating employees. Consider how you want to position the company with respect to compensation offered as compared against others in your industry and geographic area. Compensation may also be affected by the number of skilled individuals available for your position and the current economic climate. You should also consider how you will reward employees for positive performance. Will you reward longevity and merit or just merit or longevity? Will you use base salary increases or will you use bonuses and similar incentives? What kind of benefit

package will you offer? A good compensation and reward strategy combines a mix of different types of motivators designed to attract, retain, and inspire individuals with the skills and dedication necessary to make your company successful.

6. Are established procedures in place for determining employee promotions and merit raises?

**No**

Employers should develop clear, objective criteria for use in making decisions regarding promotions and merit raises (for example, if an employee gains new education or skills, performs consistently above requirements or expectations, or demonstrates the ability to take on more responsibility). Using objective criteria helps promote fairness and reduces the risk of employee discrimination claims.

7. Does your company document promotions and merit increases and the reasons for awarding them?

**Sometimes (50-74 percent of the time)**

All personnel actions should be thoroughly and accurately documented. Documentation of promotions and merit increases promotes fairness in merit decisions and provides a business justification in the event other employees assert discrimination claims.

8. Are non-financial incentives offered to employees in addition to compensation?

**Yes**

While employees are clearly motivated by tangible rewards such as salary and promotion, there are also more intangible factors, such as employee recognition, that are key to supporting employee morale and increasing employee loyalty and retention. Employers should actively promote and support various means of recognizing employees for work well done and other achievements.

### **Benefits and Leave Management**

1. Does your company have policies and procedures in place for complying with the Family and Medical Leave Act (FMLA)?

**No**

The federal Family and Medical Leave Act (FMLA) provides eligible employees of companies with 50 or more employees in 20 or more workweeks in the current or preceding calendar year with up to 12 workweeks of unpaid, job-protected leave in a 12-month period for specified family and medical reasons. It also provides certain military family leave entitlements. Employers are responsible for properly administering FMLA leave. Your company policy should include: ¶ Information provided to employees through a handbook or otherwise describing their rights and obligations under the FMLA. ¶ The use of forms for employees to elect FMLA leave and procedures for providing written notice designating leave as FMLA. ¶ Development of forms to be sent to treating healthcare providers, when necessary, to support the need for

leave. â€¢ Determination of how the 12-month period in which an employee may elect leave is measured (e.g., by the calendar year or another measure permitted under the law).

2. Is the required notice explaining employees' rights and responsibilities under the FMLA posted in your workplace?

**Yes**

Posting a notice regarding Family and Medical Leave is required under federal regulations.

3. Are policies and procedures in place to ensure compliance with federal law regarding military leave?

**Policies and procedures are in draft form, outdated, and/or difficult to understand.**

Federal and many state laws prohibit employers from discriminating against an employee who takes leave for military service. Under federal law, the Uniformed Services Employment and Reemployment Rights Act (USERRA) provides that an employer may not deny initial employment, reemployment, retention in employment, promotion, or any benefit of employment to such persons on the basis of a past, present, or future service obligation. USERRA applies generally to persons who perform duty, voluntarily or involuntarily, in the uniformed services. Your policies relating to military leave should reflect up-to-date requirements under federal and state law. Be sure to apply your company policies consistently and fairly and inform employees of the policies. Employers are required to provide to persons entitled to the rights and benefits under USERRA a notice of the rights, benefits, and obligations of such persons and such employers under USERRA.

4. Does your company have policies and procedures in place for complying with state laws relating to employee leave?

**Policies and procedures are outdated and/or difficult to understand.**

Various federal laws require private employers to grant eligible employees leave from work (either paid or unpaid) to attend to certain family, medical, or other circumstances. Those circumstances include leave for military service or for certain activities in connection with a family member who performs military service, jury duty in federal court, and time off for religious observance. Many states also have laws requiring that private employers allow employees to be absent from work, either with or without pay, due to specified circumstances (e.g., illness or a serious health condition, time off to vote, etc.). These laws may grant employees expanded or additional rights above the federal requirements, or they may be preempted by the federal law. As a result, employers in certain instances may be required to comply with only the federal law, only the state law, or both.

5. Are policies with respect to paid time off (e.g., sick leave, vacation, etc.) applied fairly and consistently to employees?

**Yes**

Federal law and most state laws generally do not require payment for time not worked, such as vacations, sick leave or holidays (although certain exceptions

do exist). However, many employers have a company sick leave or paid time off (PTO) policy, which allocates a specific number of days for employees per year. Employers should consider the following when establishing such a policy (be sure to comply with any applicable state law requirements that may apply as well):

- Identify any eligibility rules that will apply to the sick leave or other paid time off, such as full-time employment status.
- Determine whether to use leave designated solely for illness or to give employees a bank of leave to use for whatever purpose they choose, including vacation.
- Decide whether an employee can use leave designated as sick leave for illness in the employee's family.
- Determine whether unused leave can be carried over from year to year and, if so, how much can accumulate.

6. Does your company have a policy regarding leave without pay?  
**Yes, but it is in draft form and has not been formally adopted**

There are certain circumstances in which an employee may desire leave for which there is no formal paid leave available—for instance, where an employee has exhausted leave but faces a long recuperation from surgery and needs unpaid leave beyond what is required under the federal Family and Medical Leave Act or similar state laws. If an employer chooses to offer leave without pay, the employer must determine the procedure for requesting leave, the reasons for which it will be granted, and the length of time for which it may be granted. Policies regarding leave without pay should be applied consistently and fairly to avoid claims of discrimination. Employers should be certain to treat workers equally when making determinations regarding entitlement to leave without pay, and avoid any actions that could be construed as discriminatory.

7. Does your company have policies and procedures in place for complying with continuation of group health coverage requirements?  
**Yes**

The federal Consolidated Omnibus Budget Reconciliation Act (COBRA) generally requires group health plans, sponsored by employers with 20 or more employees on more than 50% of typical business days in the prior year, to offer covered employees and their family members the opportunity for a temporary extension of health coverage in certain instances where coverage under the plan would otherwise end. COBRA sets rules for how and when continuation coverage must be offered and provided, and requires that employees and eligible dependents receive a number of specific notices explaining their COBRA rights. Many states have similar laws requiring that group health plans provide COBRA-like continuation of health benefits for certain employees (and their spouses and dependents), including for employees of companies with less than 20 employees.

8. How is information regarding employee benefits communicated to employees?  
**Only during new employee orientation**

Employee benefits typically constitute a significant portion of the compensation cost of an employee. It is in the employer's interest to communicate this information to the employee so the employee understands the value of his or her total compensation package. In addition, clear communication of benefit information can help employees maximize the value of their benefits and

reduce the risk of complaints or potential litigation against the employer. Employers may also be required to provide employees with notices regarding certain benefits, including employee rights and responsibilities, under federal or state law—for instance, regarding the employee's right to continuation of group health coverage upon termination of employment.

9. Has your company adopted policies and procedures to protect the privacy of employees' "protected health information"?

Yes

The federal Health Insurance Portability and Accountability Act (HIPAA) restricts the use and disclosure by covered entities of "protected health information." Group health plans that provide or pay the cost of medical care, including employer-sponsored group health plans, are generally considered covered entities under HIPAA (however, note that a group health plan with fewer than 50 participants that is administered solely by the employer that established and maintains the plan is not a covered entity for purposes of the privacy rules). Regardless of who is responsible for administering the group health plan, employers should be aware of the HIPAA rules relating to privacy and security of protected health information and take steps to ensure that the plan is fully compliant.

## Employee Relations

### Identification of Employee Relations Issues

1. A. How often are employee attitude surveys conducted?

**Not applicable; employee attitude surveys are not conducted (SKIP to Question 2)**

Employee attitude surveys supplement traditional means of communication by allowing your employees to offer confidential feedback on their opinions of the company in terms of satisfaction with the job and how their jobs and work environment might be improved. The survey results can provide you with key information on how to improve workplace processes, policies and morale to retain existing staff and attract new employees. These surveys are most beneficial to your company when conducted on a regular basis. A regular survey schedule helps to give the company a constant reference point by which it can measure the effects of change on the internal aspects of the organization. There are a number of different ways to conduct an employee attitude survey—from simply filling out a paper survey to taking an online survey or hiring a consulting firm to perform the surveying and analysis.

2. Is a specific person or team within your company responsible for addressing concerns about employee relations issues and ensuring that employee grievances are recognized?

Yes

It is important to designate an employee (or multiple employees in larger companies with HR departments) who is trained in handling employee relations issues. Controls should be in place to ensure that this individual or team is aware of all employee grievances raised so that proper action may be taken. As employee relations is an area that is greatly impacted by federal and state

laws, companies should require proper training for all employees who handle any aspect of employee relations issues.

3. Are employee complaints monitored and evaluated in order to highlight potential areas of concern?

**No**

Employee complaints should be monitored to identify any trends in a particular area or recurring problems within a particular department or among specific managers, supervisors, or employees. It is a good management practice to keep a record (within the human resources department, separate from employees' personnel files) of all complaints filed.

4. Does your company analyze the causes of employee grievances and take corrective and preventive measures to reduce the number of complaints raised?

**No**

Analyzing the causes of employee complaints can help a company determine the most appropriate steps to take corrective action, as well as what types of preventive measures can be put in place to prevent the same kind of issue from arising in the future. It is important to address employee complaints as they arise so that issues can be resolved in a timely manner and employees can continue to be productive.

5. Is documentation maintained with respect to any allegations of discrimination filed against your company through the U.S. Equal Employment Opportunity Commission (EEOC) or your state's human rights commission?

**Rarely or never (less than 25 percent)**

Maintaining documentation on allegations of discrimination filed against your company can help identify potential problem areas within a particular department, or among specific managers, supervisors, or employees. Retaining such documentation may also be required by federal or state law.

6. Does company procedure require that a human resources representative or the company's legal counsel be consulted, as appropriate, before employees are reprimanded, suspended, or terminated? **No**

Matters involving employee discipline and discharge require careful attention to ensure compliance with all applicable federal and state laws, including laws related to anti-discrimination, the employment-at-will doctrine, and benefits-related laws. For this reason, it is very important that an individual who is knowledgeable in these laws (such as a human resources representative or the company's legal counsel) review all disciplinary actions before action is taken. Such a review can help to confirm that the appropriate action is being taken, that the action is consistent with the company's practices and other similar actions, that the punishment fits the offense, and that there is enough supporting evidence. It can also help ensure that all actions are thoroughly and accurately documented.

7. A. Are exit interviews or exit surveys conducted with all employees who voluntarily resign?

**Rarely or never (less than 25 percent) (SKIP THE REMAINING QUESTIONS IN THIS SECTION)**

Exit interviews can play an extremely valuable role in the growth of a company. The information provided in exit interviews can help the company gain a better understanding about what works well and what needs improvement, identify problem areas and ways to minimize workplace conflict, and solicit feedback on its competitive standing in the marketplace, including salary, benefits packages and rewards programs. Exit interviews should be conducted upon departure or shortly thereafter so the employee's recollections are fresh.

8. Are actions taken to address important issues identified through exit interviews or exit surveys? **Rarely or never (less than 25 percent)**

Employee turnover can be very costly for a company. If issues brought out by employee exit interviews are not addressed and resolved as appropriate, the issues may continue and even worsen.

**Implementation of Policies and Communication with Employees**

1. Are your company's human resources policies and procedures applied to all employees?

**Seldom (25-49 percent)**

It is very important to review your company's employment practices to ensure that all policies and procedures apply equally to all employees and that all policies comply with applicable federal and state law. The company should be prepared to defend the basis for any exceptions made for certain employees.

2. Does your company display employment-related posters required by federal and state law?

**Yes**

Employers are required to display a number of posters in the workplace explaining various federal and state laws and regulations, including information regarding minimum wage, equal employment opportunity, family and medical leave entitlements, and worker safety and health. Be sure to check with your state labor department for state-specific poster requirements as well as any industry-specific requirements that may apply to your business. Depending on the specific requirement and the circumstances, employers can be fined for noncompliance, so it is important to make sure all of your posters are up-to-date and the correct size.

3. A. Does your company have a sexual harassment policy in place?

**Yes**

All companies should have a sexual harassment policy in place which prohibits harassment of any type and provides an effective means for employees to report harassment without fear of retaliation. The policy should contain, at a minimum, the following elements: • A clear explanation of prohibited conduct; • Assurance that employees who make complaints of harassment or provide information related to such complaints will be protected against

retaliation; â€¢ A clearly described complaint process that provides accessible avenues of complaint; â€¢ Assurance that the employer will protect the confidentiality of harassment complaints to the extent possible; â€¢ A complaint process that provides a prompt, thorough, and impartial investigation; and â€¢ Assurance that the employer will take immediate and appropriate corrective action when it determines that harassment has occurred. An effective sexual harassment policy may help to reduce employer liability in the event harassment occurs.

4. Does your company have written and clearly defined policies and procedures for employee disciplinary actions?

**Yes**

All employee relations policies and procedures should be documented and communicated to employees as appropriate. Written policies and procedures for employee discipline help ensure consistency and fairness throughout the company. If employees believe they are being treated fairly, they are more likely to accept the consequences of their actions. Communicating policies and procedures to employees also provides them a clear understanding of the process for correcting performance problems. Be sure that your policies and procedures regarding employee discipline comply with applicable federal and state laws and regulations. Consistent and fair discipline can help prevent claims of discrimination or other unlawful conduct.

5. Does your company have a current and clearly defined policy for alcohol and substance abuse?

**Yes**

Employers can help protect their businesses from the negative effects of substance abuse in the workplace by developing drug-free workplace programs that educate employees about the dangers of alcohol and drug abuse and encourage individuals with related problems to seek help. Under the federal Drug-Free Workplace Act, some federal contractors and all federal grantees are required to provide drug-free workplaces as a precondition of receiving a contract or grant from a federal agency. All companies are encouraged to ask a lawyer or other legal expert with specific knowledge about drug-free workplace policies, programs, and case law to review their policies regarding alcohol and substance abuse to ensure compliance with applicable law.

6. Does your company have written and clearly defined policies and procedures for employee complaints and grievances?

**Yes**

Companies should have policies and procedures concerning employee complaints and grievances and communicate them to all employees. Such policies and procedures allow employees a formal avenue to register complaints and seek redress if they feel they have been wronged in some way. Even if an employee does not receive the outcome he or she desires, having policies and procedures that allow an opportunity to be heard may help ease the employee's frustration or dissatisfaction. Although grievance programs are typically used to resolve conflicts between employers and employees, such

programs can also be useful to resolve peer to peer conflicts. Any revisions to policies and procedures for employee complaints and grievances should be communicated to employees in a timely manner.

7. A. Does your company have policies and procedures in place for layoffs (also called reductions-in-force)?

**Yes**

An employer should carefully assess all of its options before resorting to a reduction-in-force of any kind. However, in certain instances a layoff may be unavoidable. It is important to have policies and procedures in place so that employees and managers are aware of the process and can prepare for the transition. Policies and procedures related to a reduction-in-force must comply with applicable federal and state law, including anti-discrimination laws, as well as any notice requirements that may apply. For example, the federal Worker Adjustment and Retraining Notification Act (WARN) generally requires employers with 100 or more employees (not counting those who have worked less than six months in the last 12 months and those who work an average of less than 20 hours a week) to provide notification 60 calendar days in advance of plant closings and mass layoffs.

B. Are employees who will be laid off provided counseling and/or outplacement assistance?

**No**

Outplacement assistance and other types of support services can help to cushion the blow of a layoff and convey the fairness of a company's policy and procedures. It is important to offer these services fairly and consistently and to thoroughly document all policies, procedures, and other records related to layoffs and employee assistance.

### **Employee Relations Practices and Records Maintenance**

1. A. Do employee disciplinary actions and counseling sessions get documented in writing?

**Often (75-99 percent)**

One of the biggest challenges in employee lawsuits is proving the reason why an employer took a particular action, especially when it has poor or non-existent documentation. All matters involving employee discipline, discharge, or any other circumstance that could give rise to employer liability should be carefully and accurately documented. Documentation offers evidence of what occurred, promotes consistency and objectivity, and is a necessary step for companies to support decisions regarding employee discipline and termination.

B. Does this documentation include the date the counseling session or disciplinary action took place and the employee's signature?

**Often (75-99 percent)**

Dating a document establishes that actions were taken in a timely manner. The employee's signature does not indicate agreement with the notice or action; it

merely serves as a record of acknowledgement.

2. Are employees given an opportunity to respond when a disciplinary action is imposed?  
**Always (100 percent)**

Consistent and fair discipline can help to prevent claims of discrimination or other unlawful conduct. Part of a fair discipline system is allowing employees the opportunity to respond to a disciplinary action, either orally or in writing. Such a practice ensures the employer hears the employee's side of the story before imposing the disciplinary action to confirm that the discipline is appropriate. An employee should also have some right to appeal a disciplinary decision to a person above the rank of the one issuing the discipline who was not involved in the initial decision.

3. How long are records relating to disciplinary and adverse actions (such as demotion, probation, suspension, and termination) kept?

**At least one year from the date of making the record or the personnel action involved, whichever occurs later**

Federal regulations require certain employers to retain personnel and employment records that they make or use in the course of their business. Employers with 15 or more employees generally must retain all personnel and employment records made or used (including in connection with a demotion, lay-off or termination) for one year from the date of making the record or the personnel action involved, whichever occurs later. In the case of involuntary termination of an employee, any such records must be retained for one year from the date of termination. Where a charge of discrimination has been filed, relevant records must be retained until final disposition of the charge. State laws may impose additional requirements on employers (including those with fewer than 15 employees) with respect to records that must be maintained and how long records must be kept. Your company's recordkeeping policy should reflect all applicable requirements in compliance with federal and state law.

4. Are final outcomes documented on all employee complaints?

**Often (75-99 percent)**

A company should always document the final outcomes of employee complaints. Such information may be used to determine the appropriate actions to be taken should similar matters arise in the future and helps maintain consistency throughout the organization. Additionally, because information relating to employee grievances may be used in lawsuits, accurate and complete documentation is extremely important.

5. Does the company have procedures in place for identifying, documenting, investigating, and analyzing employee grievances?

**Yes**

All employee complaints should be addressed and resolved in a timely manner. Having procedures in place for identifying and investigating grievances helps to ensure consistency and that all complaints receive the proper attention. Additionally, analyzing the causes of employee complaints can help a company identify potential problem areas within a particular

department (or among specific employees), as well as determine what types of preventive measures can be put in place to prevent similar complaints from arising in the future. As information relating to employee complaints may be used in lawsuits, procedures for maintaining accurate and complete documentation are also an important component that should be included in any policy for managing employee grievances. Because employee relations is an area that is greatly impacted by federal and state laws, companies should require proper training for all employees who handle any aspect of employee relations issues.

6. Where are employee grievances and related documentation filed?

**In a file separate from the employee's regular personnel file**

As a general rule, only information used for personnel actions should be placed in an employee's regular personnel file. This is particularly important in companies where employees' personnel files are consulted for such decisions as hiring, promotion, and disciplinary actions. If you have a policy which allows employees to raise complaints, they should be able to do so without fear of retaliation. As it is common for an employee's personnel file to contain information (such as issues related to job performance) that may be used to support decisions relating to discipline or termination, it is a good idea to keep documentation relating to employee complaints separate from this information to avoid any appearance that the complaint played any part in a personnel action, such as a decision to terminate.

7. Does your company monitor the number of discrimination and harassment allegations involving the company and/or its employees?

**Rarely or never (less than 25 percent)**

Companies can get a better idea of the internal sources of problems by monitoring the number of discrimination and harassment allegations. Monitoring can also help determine the type and frequency of training that is needed.

8. Are policies and procedures explaining the federal Americans with Disabilities Act (ADA) and how to handle requests for accommodations by employees clearly defined?

**No**

The ADA prohibits employers with 15 or more employees from discriminating against qualified individuals with disabilities, and requires employers to provide reasonable accommodation for such individuals (unless it would cause undue hardship). State law may impose similar requirements on employers with fewer than 15 employees. Following receipt of a request for reasonable accommodation, the employer and the individual with a disability should engage in an informal process to clarify what the individual needs and identify the appropriate accommodation. The employer may ask the individual questions that will enable it to make an informed decision about the request, including asking what type of reasonable accommodation is needed. Policies and procedures must comply with the law, including confidentiality rules. Under the ADA, with limited exceptions, employers must keep confidential any medical information learned about an employee (including a request for

reasonable accommodation).

9. Does your company have a designated resource (HR professional or outside legal counsel) for guidance on managing ADA workplace accommodation requests from employees?

**Yes**

Improper handling of an ADA request can be extremely costly, so it is important to consult with legal counsel where necessary to ensure full compliance with the law. An employer should respond promptly to a request for reasonable accommodation. Where the individual or the employer is not familiar with possible accommodations, extensive resources are available to help the employer identify reasonable accommodations once the specific limitations and workplace barriers have been ascertained. Similarly, the employer should act promptly to provide a reasonable accommodation. An employer may generally not disclose that an employee is receiving a reasonable accommodation because this usually amounts to a disclosure that the individual has a disability. The ADA specifically prohibits the disclosure of medical information except in certain limited situations (such as informing supervisors and managers of necessary work or duty restrictions and necessary accommodations).

10. Does your company have an employee assistance program (EAP) available to employees?

**Yes**

An employee assistance program (EAP) can provide support services both on a company-wide basis as well as to individual employees and family members experiencing personal issues and challenges. The structure and operation of an employee assistance program will vary with the needs of each individual company.

### **Performance Appraisals**

1. Do all company employees receive formal performance appraisals?

**No (SKIP THE REMAINING QUESTIONS IN THIS SECTION)**

Performance evaluations are important for informing employees of the quality of their work, identifying areas needing improvement, setting specific objectives for performance, and providing employees an opportunity to discuss career goals and the support needed to meet those goals. Although there is no single rule as to the frequency of evaluations, it is a good management practice to conduct them annually. Timing of the reviews may take place near the anniversary of an employee's start date. Alternatively, some companies conduct the reviews for all employees within the same few weeks every year.

# Recruitment and Selection

## Planning

1. Does your company forecast numbers and specific types of positions that will need to be filled?

**No, we do not forecast the number or the specific types of positions.**

Projecting workforce needs is critical to effective planning for your company's workforce. Forecasting of both the number and specific types of needed positions is essential in order to develop an appropriate recruitment action plan.

2. A. Are procedures in place for identifying job vacancies?

**Yes**

In a small organization, the establishment of a procedure for identifying and planning for vacancies helps the company operate more efficiently and effectively. A vacancy that goes unfilled may place undue strain on remaining employees. In a larger organization, efficient identification of vacancies may allow for routine posting of such vacancies, as well as filling them promptly.

B. How often are recruitment plans utilized for addressing job vacancies and new positions?

**Annually**

Companies should have an established procedure for identifying, planning, and meeting staffing needs. The organization should identify and determine staffing goals based upon the company's mission, strategies, goals, and objectives as articulated in its strategic, operational, financial, and human resources plans. As staffing needs are likely to be continuously changing, it is a good idea to review recruitment plans at least annually.

3. Does the company plan for regional and national recruiting searches, when appropriate?

**Yes**

For certain executive, managerial or highly skilled technical positions, posting and announcement locally is often not sufficient to attract a qualified and diverse applicant pool. Therefore, companies may wish to establish budgets for regional and national searches. This budget may include expenses for advertising, travel for recruiters, or even payment for executive search firms to assist in recruiting.

4. Are recruitment strategies, policies, and procedures executed without regard to race, national origin, religion, age, sex or other protected classes in accordance with federal and state anti-discrimination laws?

**Yes**

Both federal and state laws generally prohibit employers from recruiting new

employees in a way that discriminates against them because of their race, color, religion, sex (including pregnancy), national origin, age, disability, genetic information or other characteristics. When developing recruitment plans and procedures, a company should consider the diversity of the population in the geographic region(s) from which it recruits and utilize recruiting methods which are reasonably likely to generate a diverse applicant pool. Employers should also be certain that recruitment plans which on their face appear neutral do not have an unlawful disparate impact on a protected class of persons. Certain employers, e.g., those with substantial government contracts, may be required to engage in affirmative action to assure sufficient hiring of women and minority employees.

### **Recruiting Job Applicants**

1. Does your company have an established procedure for posting job openings both internally and externally?

**Yes**

It is generally a good idea for companies to consider posting job openings internally, so as to allow current employees to apply for the open positions, as well as to post the jobs externally. Posting jobs internally can provide encouragement and the opportunity for advancement to current employees. On the other hand, posting externally can help to avoid disparate impact discrimination—for example, to prevent word-of-mouth hiring that is likely to create a barrier to equal employment opportunity for racial or ethnic groups that are not already represented in the employer's workforce. Whatever procedures are established should be used consistently for all recruiting for similarly situated employees.

2. Are positions open to external applicants posted with your state unemployment agency?

**Always (100 percent)**

Some states require that job openings be posted with the state unemployment compensation agency. Posting may be a wise policy even if not required by law, particularly in a challenging economy where many good candidates may be registered with the agency.

3. Are job postings developed from a current position description or recent job analysis?

**Most of them (75-99 percent)**

Reliance upon an actual job analysis and/or recent job description when posting an opening can help ensure that the job description as drafted accurately reflects the objective requirements of the job. Employers should carefully review job descriptions on a regular basis.

4. Do current position descriptions or job analyses identify the essential knowledge, skills, abilities, education, and experience needed to perform the job?

**All of them (100 percent)**

Each job should be analyzed to determine the duties to be performed and the knowledge, skills, and abilities needed by an employee to do the job. An employer should not require knowledge, skills, or abilities which are

unnecessary or which are not directly related to the job. Such an analysis can assist the employer in making reasonable accommodation for disabled applicants or employees, and may also mitigate the risk of unlawful disparate impact on any group.

5. Are all job postings reviewed by your company's HR professional or other designated professional to ensure compliance with applicable law?

**Most of them (75-99 percent)**

At least one person in the company who has a working knowledge of employment discrimination and other legal issues relevant to recruiting should review all job announcements before posting. Such a review helps ensure that the postings contain the proper job titles, salary ranges (if provided), and other pertinent information and that they do not contain anything illegal or inappropriate, as well as ensures consistency among various announcements.

6. Do job offers include salaries that are within the posted salary range for the position?

**Not applicable; job postings do not contain salary information**

If an employer elects to include information on a salary range when posting a job, the applicant should be given a salary within that range absent extraordinary circumstances. It may be preferable to simply announce that compensation will be commensurate with experience.

7. Does your company measure recruiting effectiveness by tracking and evaluating recruited employees and the total dollar costs of different recruiting methods?

**No**

Some recruiting methods are more effective than others. Companies should evaluate the success of different recruiting methods to determine the cost versus the quantity and quality of employees hired through each method.

8. Are your recruitment policies and procedures periodically reviewed and evaluated to ensure they are meeting the needs of the company?

**Yes**

Recruiting can be costly. By regularly assessing the costs of recruitment and the effectiveness of recruiting methods, the employer can gain the most value for the money spent. Each employer should determine the best methods and procedures for its business based on its success in attracting candidates with the appropriate knowledge, skills, and abilities, the effectiveness in reaching the population in the targeted recruiting area, and the cost.

### **Collecting Relevant Information and Selecting Final Applicants**

1. Are applicants and current employees required to complete job applications or submit comprehensive resumes before being interviewed for vacant positions?

**Yes**

All applicants for a position, whether external applicants or current employees, should be required to either complete a job application or submit a current resume. Applications should be designed to solicit information relevant to the

vacancy (or to employment in general when the applicant is not applying for a specific opening). For current employees, an updated resume ensures that the employer has the most current information concerning the employee's knowledge, skills, and abilities. Employers must be careful not to request any information that could be used to unlawfully discriminate against an applicant.

2. Does your company require the use of standardized interview questions developed for each specific job vacancy?

**Seldom (25-49 percent)**

Interview questions should relate directly to the job and the applicant's ability to perform the job's essential functions. Using standardized questions specific to an open position allows the comparison of answers among a pool of candidates. Interviewers should be permitted to ask follow-up questions, when appropriate.

4. To what extent does your company use clear, objective criteria, such as a standardized scoring tool (e.g., selection matrix) to rank applicants for a particular position?

**Seldom (25-49 percent)**

Hiring decisions should be made upon measurable, objective criteria. An employer may use a selection matrix to objectively measure an applicant's qualifications for a job. A matrix allows an objective and consistent assessment of applicants, and it allows for more accurate and objective comparison of multiple applicants. The use of such clearly objective criteria also helps to prevent selection being made upon personal bias or other criteria that are not job-related and which may be unlawfully discriminatory.

5. Does the company verify the information provided by applicants (such as work and salary history, academic credentials, certifications) before a final selection is made?

**Yes**

Employers should check the references of any candidate who may be hired and may need to verify other information, depending upon the position. Careful verification reduces the risk of an unqualified or unsavory employee being brought into your workplace. Verification can also be valuable in the event of workplace violence or any charge of negligent hiring.

6. Are procedures in place for conducting background checks that may be required under state law for certain employees?

**Yes**

Many states require background checks by law for certain positions (such as law enforcement positions, positions with access and control over financial transactions, or positions working with children). Employers must be aware of state mandates and, when affected by the requirements, should have a standardized system in place for having such checks conducted. Be particularly mindful whether the check must be national or regional and what background elements are being investigated. Additionally, be sure to comply with applicable state and federal laws relating to background checks, such as the Fair Credit Reporting Act (FCRA).

7. Are all final hiring decisions thoroughly documented, including both the reasons for hiring as well as reasons for not hiring?

**Sometimes (50-74 percent of the time)**

Hiring decisions should be carefully documented and the records retained according to the employer's recordkeeping policy in compliance with applicable law. The documentation should include information as to why a particular candidate was hired, as well as any specific reasons why a candidate was not hired. Such records will be important in the event of an applicant's claim of discrimination in hiring. In addition, the records may be helpful in explaining to a current employee why he or she was not hired for a particular position. Documentation should include copies of job advertisements, applications, resumes, results of any pre-employment testing, copies of selection matrices, interview notes, offer letters, and any other information used in making the final hiring decision.

8. Do you use offer letters or otherwise make job offers in writing?

**Sometimes (50-74 percent)**

The employer may initially notify the selected applicant of the offer verbally; however, the company should also send the applicant a written job offer setting forth job title, salary, start date, fringe benefits, and any other essential terms and conditions of employment. Alternatively, for less skilled positions, a memo to the file (perhaps with a copy to the applicant) may suffice.

9. To whom are "no offer" (rejection) letters sent?

**Those applicants who were interviewed for the position but not selected**

As a courtesy, companies should consider sending letters to all unselected applicants in a timely manner. These "no offer" letters can help build good will for the company, as it can be frustrating for candidates to apply and hear nothing at all as to whether the position has been filled or otherwise. At a minimum, a letter should be sent to every applicant who was interviewed for the position.

## **Maintaining Policies and Procedures**

1. Are recruitment and selection processes supported by written policies and procedures that are up to date, accurate, and complete?

**These documents are partially developed.**

Recruitment and selection processes should be reduced to writing and reviewed regularly to be certain that what is in the written policy or procedure is in fact how things are done in practice. Written policies help to ensure the use of consistent practices throughout the company and mitigate the risk of illegal actions, and may also help the efficiency of the recruitment and selection process.

2. How are managers and interviewers informed regarding laws applicable to the recruitment and selection process?

**No training or guidelines are provided.**

All employees who are involved in the recruitment and selection process should receive training with regard to the company's hiring procedures, as well as employment discrimination laws and other federal and state laws related to recruitment and selection. Written guidelines explaining these rules in clear language should be provided to such employees for future reference, and the guidelines should be regularly reviewed and updated, preferably in consultation with your company's legal counsel.

3. From the date a record is created or a personnel action is taken, how long does your company keep applications, resumes, and other applicant information?

**At least one year from the date of making the record or the personnel action involved, whichever occurs later**

Federal regulations require certain employers to retain personnel and employment records made or used in the course of business. For example, employers with 15 or more employees generally must retain all personnel and employment records made or used (including application forms submitted by applicants and records relating to hiring) for one year from the date of making the record or the personnel action involved, whichever occurs later. In the case of involuntary termination of an employee, any such records must be retained for one year from the date of termination. Where a charge of discrimination has been filed, relevant records must be retained until final disposition of the charge. State laws may impose additional requirements on employers (including those with fewer than 15 employees) with respect to records that must be maintained and how long records must be kept. Your company's recordkeeping policy should reflect all applicable requirements in compliance with federal and state law.

## **Safety, Health and Security**

### **Management**

1. Does your company have a safety department or a designated safety representative?

**Yes**

As an employer, you have a duty to protect your workers from injury and illness on the job. Compliance with the federal Occupational Safety and Health Administration (OSHA) rules, along with an effective voluntary safety and health program, can help reduce your costs and injuries and illnesses. Effective protection from occupational hazards takes leadership and commitment from top management. Management leadership provides the motivating force and the resources for organizing and controlling activities within an organization. Safety representatives and committees are frequently involved in safety planning to reduce work hazards, promote safety awareness, and encourage safe work practices.

2. What percentage of your employees receive safety orientation training?

**Not applicable; we do not provide safety training**

Safety orientation training helps employees develop the knowledge and skills

needed to understand workplace hazards and safe procedures, and gives them a basic understanding of the company's safety program. It also sends a message that safety is everyone's responsibility. The content of a company's training program and the methods of presentation should reflect the needs and characteristics of the particular workforce. Managers and supervisors should also be included in the training plan. Training for managers should emphasize the importance of their role in visibly supporting the safety and health program and setting a good example. Supervisors should receive training in company policies and procedures, as well as hazard detection and control, accident investigation, handling of emergencies, and how to train and reinforce training. Keeping records will help ensure that everyone who should get training does. A simple form can document the training record for each employee.

3. How does your company handle employee safety complaints?

**The immediate supervisor, or a designated safety representative uses an informal (undocumented) method for addressing safety complaints.**

Safety complaints should be immediately investigated, resolved, and documented. The federal Occupational Safety and Health Act (OSH Act) requires each employer to provide a work environment free from recognized hazards that are causing or likely to cause death or serious harm to employees.

4. Are controls in place to ensure that supervisors know what to do when an employee is injured on the job?

**No**

Employers covered by the federal Occupational Safety and Health Act or similar state laws are generally required to submit certain reports and complete required actions within specific timeframes to comply with their responsibilities under the law.

5. Does your company have controls in place to ensure prompt action in the event of violent acts in the workplace?

**No**

Workplace violence can occur anywhere and at any time, so it is important to be prepared and have appropriate controls in place should a dangerous situation arise. The following are some policies to consider including in a plan for action following an incident of workplace violence: â€¢ Encouraging employees to report all incidents and threats of workplace violence. â€¢ Providing prompt medical evaluation and treatment after the incident. â€¢ Reporting violent incidents to the local police promptly. â€¢ Informing victims of their legal right to prosecute perpetrators. â€¢ Discussing the circumstances of the incident with employees and encouraging them to share information about ways to avoid similar situations in the future. â€¢ Offering stress debriefing sessions and posttraumatic counseling services to help workers recover from a violent incident. â€¢ Investigating all violent incidents and threats, monitoring trends in violent incidents, and instituting corrective actions.

6. Are allegations of workplace violence investigated in a timely manner?

**Often (75-99 percent of the time)**

Prompt action can mitigate a potentially dangerous situation and sends a clear message that the violent or threatening behavior will not be tolerated.

7. Do managers receive training on how to deal with violent and threatening behavior in the workplace?

**No**

Preventive measures for violence in the workplace include workplace surveillance, security personnel, and training and instruction for supervisors and employees on dealing with workplace violence. Employers should learn to recognize various employee behaviors that typically lead to violence.

### **Policies and Procedures**

1. Are written safety policies and procedures accessible to all employees?

**No**

Health and safety policies and procedures should be clearly explained and documented in a company's human resources or operations manual, as well as in the employee handbook if appropriate. It is important that all policies and procedures comply with applicable federal and state laws and regulations. Providing employees with written manuals helps to ensure they understand their rights and responsibilities when it comes to workplace safety and also that policies and procedures are applied consistently throughout the company.

2. Does your company have a policy on workplace violence?

**Yes**

Workplace violence is a growing concern for employers and employees. The best protection employers can offer is to establish a zero-tolerance policy toward workplace violence against or by their employees. A policy on violence in the workplace that specifies preventive measures and appropriate penalties for infractions clearly communicates a company's stance on this critical issue. Employers should establish a workplace violence prevention program or incorporate the information into an existing accident prevention program, employee handbook, or manual of standard operating procedures. It is critical to ensure that all employees know the policy and understand that all claims of workplace violence will be investigated and remedied promptly.

3. Does your company have policies and procedures for handling workers' compensation claims?

**No**

A company's internal policies regarding workers' compensation must accommodate state requirements. Be sure to review and update your policies and procedures as necessary to incorporate any changes in the law or new agency requirements.

4. Is there an established return-to-work policy for individuals who take workers' compensation leave?

**No**

A return-to-work policy helps assure that any necessary accommodations are evaluated and implemented for the safety of both the employee and coworkers. Such a policy should also address the federal Family and Medical Leave Act (or similar state laws), if applicable, including any requirements for returning employees to the same or similar job.

## Barre Supervisory Union

### BSU EXPENSE BUDGET STATUS REPORT

Statement Code: BOARD BSU

Account Number / Description	ADOPTED BUDGET	Y-T-D EXPENSES	ENCUMB	REMAINING BALANCE
	7/1/2015 - 6/30/2016	7/1/2015 - 6/30/2016	7/1/2015 - 6/30/2016	7/1/2015 - 6/30/2016
2210 Curriculum Development	\$147,799	\$104,642	\$18,484	\$24,673
2225 Technology	\$556,680	\$423,542	\$73,120	\$60,018
2310 Board of Education	\$45,665	\$58,668	\$12,090	\$(25,093)
2319 Board - Other Services	\$0	\$4,227	\$0	\$(4,227)
2320 Superintendent's Office	\$281,169	\$270,973	\$51,657	\$(41,461)
2421 Early Ed Administration	\$3,300	\$1,000	\$0	\$2,300
2520 BUSINESS OFFICE SERVICES	\$393,142	\$369,636	\$54,203	\$(30,697)
2600 PLANT OPERATION & MAINTENANCE	\$59,305	\$48,808	\$3,701	\$6,796
1191 BC SHARED STAFF SERVICES	\$0	\$138,981	\$57,454	\$(196,435)
1192 BT SHARED STAFF SERVICES	\$0	\$94,247	\$26,714	\$(120,961)
1193 SHS SHARED STAFF SERVICES	\$0	\$121,214	\$44,873	\$(166,087)
2420 Special Education Administration	\$40,760	\$31,263	\$6,070	\$3,427
2740 VEHICLE SERVICING & MAINT	\$0	\$7,000	\$0	\$(7,000)
<b>GRAND TOTAL</b>	<b>\$1,527,820</b>	<b>\$1,674,201</b>	<b>\$348,366</b>	<b>\$(494,747)</b>