September 18, 2012

APPENDIX OOO-3-7

To: Members of the Board of Education   **September 24, 2012**

From: Jane Belmore, Superintendent of Schools

RE: SECOND REVISION--Process for Developing the MMSD Employee Handbook

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Our mission together is to improve student learning for all, and we understand that our employees are the people who directly or indirectly impact that learning. With the passage of Act 10, the District is responsible for developing an Employee Handbook. The MMSD Employee Handbook will be reflective of expectations for employees and obligations of the District to our employees. It is a way to document expectations and obligations of management and staff. In addition, the handbook establishes a written uniform set of expectations and procedures and provides a vehicle to communicate these with employees and management to ensure that everyone receives the same information. The handbook also potentially provides legal protection for both employees and the District.

With the passage of Act 10, school districts are limited to collectively bargain over a percentage of a total base wage increase no greater than the percentage change in the consumer price index as provided by the Wisconsin Department of Revenue (for contracts starting July 1, 2012 – 3.16%). It is necessary to negotiate over the total amount available for distribution, as well as the manner in which the amount is distributed. In addition we are legally required to adhere to a grievance procedure that must cover employee discipline, employee termination and work place safety. This bargaining process limited to a base wage increase will adhere to a timeline and follow the process that we have used in the past. All other expectations and obligations must be included in the Employee Handbook.

This document outlines the recommended process for developing the MMSD Employee Handbook.

Guiding Principles

Our philosophy in developing the Handbook is to create a workplace that attracts, develops and maintains high quality employees. Our approach to the handbook will be through the following guiding principles**.** The handbook development must**:**

1. Apply a clear strategy and transparent process which will result in a document destined to provide a strong school system for the community, an environment that attracts, develops, respects and retains high-impact staff while also providing a high-achieving student learning environment.

2. Support Improvement in student learning. As in everything we do, the first question and the top priority is student learning. How does what we are considering impact students?

3. Empower staff to do their best work. How does what we are considering impact teachers and staff? Does it help or hinder them in doing their jobs effectively?

4. Strategically align the use of resources. Does what we are considering align with our achievement gap plan? Will it allow us to implement, measure, and improve that work? Is it financially responsible?

5. Avoid redundancies and create consistencies. Is what we are considering already outlined in state law or Board policy or other mandates?

6. Consider incremental change. Does what we are considering lend itself to gradual change? Can we work toward a larger goal through incremental steps?

7. Serve as a vehicle for respectful discussion. Will what we are considering help or hinder respectful dialogue.

The Board will establish the process including working groups and timeline.

Process:

1) Conduct and analyze survey of teachers, staff and administrators.

2) Taking into account survey results, Administration informs Board:
   a) What legally has to change for the handbook
   b) What policies or practices set forth in CBAs are recommended to be carried forward as Board policy without change.
   c) What policies or practices set forth in CBAs are recommended to be addressed as Board policy but should be reviewed and possibly changed.
   d) What policies or practices set forth in CBAs are recommended not to be carried forward as Board policy.

   The Administration's recommendations are presented at a meeting of the Board's Operational Support Committee on October 8. At a full meeting of the Board on October 29, the Board votes on the policies or practices to be submitted to designated working groups for discussion and collaborative exploration intended to culminate in consensus agreement on recommended approaches to the policies or practices.

3) Establish Working Groups.
   a) Oversight Group
      (1) Superintendent (chair)
      (2) Chief of Staff
      (3) 1 member nominated by each bargaining unit
      (4) 3 building principals; up to 4 other administrators

    b) Advisory Groups
        (1) One advisory group for each employee work group
            (a) Composition
                (i) Teacher work group-

                        6 teachers (3 selected by the union, 3 selected to balance the complexity of the work group) and up to 6 administrators

                (ii) Other work groups – 3 members of the applicable employee work group selected by the work group and up to 3 administrators

            (b) Each Advisory Group is facilitated by an administrator
                (i) The process of forming the Oversight Group and Advisory Groups and identifying their membership begins immediately upon Board approval of the Guiding Principles and Plan.
                (ii) Superintendent's Administrative Advisory Group will research areas of handbook content and provide information to Oversight Group, other Advisory Groups and the Board.
                (iii) The Oversight Group and Advisory Groups may call upon additional staff with specialized knowledge and expertise to provide information on specified topics if the groups believe such assistance will enhance their collaborative efforts.
                (iv) All meetings of working groups are noticed as public meetings

4) Advisory Subgroups will only deal with issues affecting the specific subgroup. All groups will refer to the Guiding Principles as issues are discussed. Subgroups may develop their own staff surveys to gather initial information with overall coordination of these surveys by the Oversight Group.

5) Oversight Group comes to agreement regarding concepts for handbook content that will be common to all bargaining groups. The Oversight Group will update the timeline. The Oversight Group will also coordinate the surveys conducted by the Subgroups.

6) Advisory Subgroups meet, discuss and agree upon concepts related to handbook content and also identify any unresolved issues. After one or more attempts to reach consensus on the unresolved issues, a brief report setting forth the results of the Subgroup's collaboration (including resolved and unresolved issues) is sent to the Oversight Group. The Oversight Group may:

    a) Accept the report and send to Board for final decision (i.e., Board accepts agreed-upon language or makes final decisions on unresolved issues)
    b) Consider unresolved issues; make suggestions to subgroup whereupon the Advisory Subgroup makes a final attempt to resolve issues. The results of its collaboration are then forwarded to the Board for appropriate action.

7) A status report on the work of the Oversight Group and Advisory Subgroups is submitted for consideration at a meeting of the Board's Operational Support Committee on November 19. Public comment on the process is invited at this and other meetings of the Operational Support Committee

8) The Oversight Working Group and Advisory Subgroups set their own schedules as needed such that all agreements and unresolved issues are forwarded to the Board prior to the meeting of the Board's Operational Support Committee meeting on December 10. The Board takes final action on the agreements and unresolved issues at a full Board meeting on December 17.

9) The Board has final say on the handbook content and will be the final decision-maker for any issue not resolved by the Oversight Group and/or Advisory Subgroups.

10) The dates and timelines set forth in the Plan are intended to be flexible and may be adjusted by the Board as necessary to facilitate effective collaboration.