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Keywords
collective labor agreements, collective bargaining agreements, labor contracts, labor unions, United States Department of Labor, Bureau of Labor Statistics

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AdA

Administrative Association Handbook
1989-90

Phoenix Union
HIGH SCHOOL DISTRICT
EXCELLENCE • SUCCESS • COMMUNITY SUPPORT
PHOENIX UNION HIGH SCHOOL DISTRICT
District Administrative Offices
2526 West Osborn Road
Phoenix, AZ  85017

GOVERNING BOARD

Judith Pettit, President
Mary E. Price, Clerk
Scot Butler III, Member
Linda LaFoy, Member
David A. Wood, Member

* * *

SUPERINTENDENT

Timothy J. Dyer

* * *

ADMINISTRATIVE ASSOCIATION OFFICERS

Nancy Kloss, President
George Mannon, President-Elect
Dorann Thoreen, Secretary
Lorrie Drobney, Treasurer
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CHAPTER ONE
ADMINISTRATORS' ASSOCIATION RIGHTS

A. MEET AND CONFER

The Governing Board, through the Superintendent, will designate members of the Superintendent's Cabinet to meet with administrative representatives and confer on matters that are pertinent to the Handbook.

B. REPRESENTATION

The Governing Board recognizes the Administrators' Association as the primary representative of all the administrative staff during their period of employment by the District.

C. MUTUALITY OF CONCERN IN FISCAL EMERGENCY

The Governing Board and the Administrators' Association recognize that there are external factors which could create a fiscal emergency. Therefore, any serious reduction or significant increase in instructional services occurring as a result of the foregoing will not take place until groups have been fully informed and have had an opportunity for input into the resolution of the emergency.

D. REVIEW OF THE HANDBOOK

The contents of the Administrators' Handbook will be reviewed annually for revision, deletions, or additions.

E. SAVINGS CLAUSE

This Handbook is subject in all respects to the laws of the United States and the State of Arizona with respect to the powers, rights, duties, and obligations of the Governing Board. In the event that any provision of the Handbook shall at any time be held contrary to law, then such provisions shall be of no force and effect, but all other provisions shall be continued in full force and effect. It is understood that a formal legal opinion issued by the Office of County Attorney, and concurred by the Office of the Attorney General, shall have the force of law for the Board.

This Handbook is also subject in all respects to the policies of the Governing Board, and in the event there are any of the contents of this Handbook
which are not in agreement with the Board Policies as stated in the Board Policy Manual, the Board policies shall have precedence.

F. DISTRIBUTION AND PRINTING OF HANDBOOK

The Administrators' Association Handbook shall be printed at the District's expense and made available to each administrator within 105 days after the close of the meet and confer process.

G. RIGHT TO MEET

The Administrators' Association shall have the right to call meetings of its membership throughout the school year.

H. AD HOC JOINT COMMITTEES

The Administrators' Association President shall appoint the administrative members of these committees.

I. PROCEDURES FOR MEETING WITH THE SUPERINTENDENT

The Superintendent or designee will meet once each month with the Executive Board of the Administrators' Association (AdA) to discuss District issues.

J. MEET AND CONFER PROCEDURES

1. Meeting Times and Places

The spokespersons for each meet and confer team will meet as early as possible to exchange proposals. Additional proposals and counter proposals may be presented during the meet and confer process.

2. Meet and Confer Teams

Each party will select its own representatives and designate a spokesperson who will carry the necessary authority to make proposals, counter proposals, concessions, and to reach tentative agreement on items being discussed subject to approval of all such agreements by the respective constituents.

3. Good Faith

The parties agree that they will make a good faith effort to resolve matters to their mutual satisfaction and agreement.
4. Access To Information

The Governing Board Team agrees to make a good faith effort to furnish the AdA available information upon request.

5. Caucuses

Either party may request a caucus at any time. Causes of either party shall be conducted apart from the other party and in private.

6. Agendas

The last item of business at each meet and confer session shall be the setting by mutual agreement of the time, site and agenda of the subsequent meet and confer session(s). Once an agenda has been approved by both teams, any additions must have mutual consent.

7. Tentative Agreements

Tentative agreements reached as a result of discussions will be reduced to writing and will have conditional approval of both parties, indicated by the initialing and dating of said agreements by the spokesperson.

8. Ratification

When tentative agreement has been reached by the parties on all meet and confer issues, each party will recommend approval to its constituents. The final agreement will be signed and dated by authorized designees of the AdA and the Governing Board.

K. DISTRICT COLLECTIVE RIGHTS

See Appendix J
CHAPTER TWO

INDIVIDUAL ADMINISTRATOR RIGHTS

A. CITIZENSHIP

Administrators shall be entitled to full rights of citizenship and no religious or political activities of any administrator or the lack thereof shall be grounds for any discipline or discrimination with respect to the professional employment of such administrator.

B. RIGHT OF PROFESSIONAL IMPROVEMENT

When administrative performance is deemed unsatisfactory by his/her immediate supervisor, that administrator has the right to a jointly prepared professional improvement plan and timetable.

C. RIGHT OF CONFIDENTIALITY

The evaluation report of an administrator is confidential and shall not be released or shown to any person except as permitted by Statute or as required by court order.

D. RIGHT OF REVIEW

Each administrator has the right to review all materials in his/her personnel file except confidential letters of recommendation.

E. SUBMIT MATERIALS

The administrator shall have the right to submit materials for his/her file. This material shall be submitted to the immediate supervisor who will forward to the Personnel Office relevant material to be placed in the administrator's file. Submitted material not placed in his/her file shall be returned to the administrator.
F. LEGAL ASSISTANCE

In the case of an assault upon an administrator or a complaint or suit by third parties as a result of action taken by an administrator while performing his/her duties, the District shall render all reasonable assistance to the administrator in connection with the handling of the incident by law enforcement and judicial authorities.

G. ACCEPT CONTRACT

An administrator shall indicate acceptance of contract for the ensuing year by signing and returning the contract to the Personnel Office within 30 days after the receipt of the contract. Failure to do so will indicate that the administrator has resigned.

H. RIGHT OF RESIGNATION

Administrators who wish to terminate employment will notify the District Personnel Office in writing according to established timelines, but only after such action has been reported to and discussed with the immediate supervisor concerned.

I. RIGHT OF CONFERENCE PRIOR TO ADMINISTRATIVE TRANSFER

When an administrative transfer becomes necessary, the administrator and his/her immediate supervisor shall meet with the Superintendent or designees prior to the transfer.

J. RIGHT OF SENIORITY

Administrative seniority shall be determined by the first date of current full-time continuous employment within each administrative category (i.e., principal, director). Time spent in an acting position is included in seniority only when the person is placed in the position/category on a permanent basis in which they earlier had acting status.

Whenever reduction-in-force procedures are implemented, reduction-in-force will be based on seniority within the District according to the following guidelines:

1. In categories with only one job description (i.e., principals), the least senior member would be affected.
2. In categories with multiple job descriptions (i.e., directors, division managers) the person affected would be the least senior member within the job description:

   a. The person affected by the reduction-in-force could replace the person with the least seniority in another category only if s/he meets the current job qualifications for that position. The superintendent/designee will determine if the qualifications are met.

   b. If the person affected does not meet the job qualifications, then provision 3 below is applicable.

3. In the event a reduced-in-force administrator has served in a lower administrative position, s/he would be eligible to move to the lower position with a cumulative number of years of service from any level above that position, together with the years of service in that lower position, to determine his/her assignment based on seniority. A prerequisite would be that the reduced-in-force administrator would have had to serve in that lower administrative position in order to be eligible for assignment to the lower position. Additionally, s/he must meet the qualifications of the current job description for that position.

4. Reduced-in-force administrators who have earned District teacher tenure and have not received an assignment in an administrative position would have reduction-in-force rights and privileges as follows:

   a. Administrators shall retain all the rights of teacher tenure earned as a certified employee of the District should they be voluntarily or involuntarily returned to a position on the District teachers' salary schedule for the cumulative total years of service in the District.

   b. Any teacher who shall be transferred to an administrative position and later returned to a teacher status shall retain such rights as s/he may have had as a teacher prior to such transfer to administrator, and to full credit for total experience in the District.

5. As vacancies occur, the reduced-in-force administrator will have recall rights, based on his/her seniority, up to a period of three years. After being notified and offered an available administrative position, the employee must reply to the Personnel Office within a maximum of five work days. Failure to reply or decline the offer will result in the forfeiture of all rights to recall as an administrator.
K. RIGHT OF NOTIFICATION OF TERMINATION

If an administrator is to be terminated at the end of the fiscal year, a written notice of termination shall be sent to the administrator on or before April 15 of a given year. Termination of a contract during the school year requires 30-day notice by either party. Due process must be followed as outlined in Chapter 5.

L. RIGHT OF PAYROLL DEDUCTIONS

Administrators may sign and deliver to the Personnel Office authorization for payroll deductions approved by the Governing Board.
A. REQUIREMENTS FOR EMPLOYMENT

The selection of administrators for the District is based on (1) evaluation of the written application, transcripts, and recommendations; (2) job qualifications as listed on the job description; (3) personal interviews; (4) recommendation to and selection by the Superintendent.

B. ASSESSMENT AND EVALUATION

The Board authorizes the Administration and designees of the AdA to develop regulations and procedures that will assist administrators in the improvement of leadership and management skills to meet their individual responsibilities.

The assessment and evaluation of the performance of District administrators shall be accomplished by the development and adoption of objective assessment and evaluation guidelines and procedures that reflect an individual's ability to carry out the goals of the District and to perform job functions related to the assigned position.

1. A minimum of one (1) performance evaluation of each administrator will be made annually. His/her immediate supervisor will meet with the administrator and orally conduct the evaluation. This evaluation will be in writing, signed by the evaluatee and the evaluator.

2. The administrator shall be given the opportunity for an oral review of the evaluation and be allowed to attach any statement or item of information to the evaluation within ten days after the review.

3. Should an administrator desire to appeal the evaluation, the request for appeal must be made to the Director of Personnel, in writing, within ten (10) workdays after signing the evaluation(s). The appeal shall be held in no less than three (3) workdays after notification and a written decision rendered within five (5) workdays after appeal hearing.

Employees may have representation at evaluation appeal hearings.
4. Copies of the evaluation shall be provided to the administrator and the Employee Relations Office for inclusion in the administrator's permanent record.

5. CONFIDENTIALITY. Copies of assessment and evaluation reports of administrator performance are confidential, and do not constitute a public record. They shall not be released or shown to unauthorized persons, in either draft or completed form.

C. ACTING ADMINISTRATORS

Acting administrators are administrators who have been assigned by the Superintendent to an administrative position on a temporary basis.

Ten-month administrators who are placed on an acting status in a 12-month position, shall accrue benefits commensurate with the new position and s/he will be placed on the first step of the appropriate range for the acting position. Twelve-month administrators who are placed on an acting basis at a higher range will be placed on the step on the new range to ensure a higher salary than the step s/he occupied on his/her former position.

The placement on the salary schedule shall be retroactive to the first date of the acting assignment within the fiscal year.

D. VACANCIES

Vacancies which occur in new and existing administrative positions shall be advertised in the District. Notice of such vacancies shall be posted on employee bulletin boards.

All vacancies may also be advertised outside the District before the selection process begins.

The Administration reserves the right to encourage additional applicants to apply when such action is to the advantage of the District.

During the summer, the administrator in charge of the various offices will be responsible for posting notices of the above vacancies received from the Employee Relations Office. Administrators interested in being notified of the vacancies occurring during the summer will inform the Employee Relations Office to be placed on a summer mailing list.

Interested applicants shall apply to the Employee Relations Office in writing, prior to the deadline, stating the position desired. Applicants must fill out a district application for positions they are applying for unless they have a current application, no later than the last fiscal year, on file in the Employee Relations Office.
Relations Office. All applications for positions advertised shall be reviewed promptly and the vacancy filled without delay. Applicants to be interviewed will be selected from the complete list of applicants for the position on file in the Personnel Office. Currently employed personnel in the District are to be interviewed and be given preference if equally qualified.

Vacancies may be filled by transfers from within the District. An administrator who wishes a transfer should submit his/her request for such transfer after a position has been advertised. Applicants must fill out a district application for positions they are applying for unless they have a current application, no later than the last fiscal year, on file in the Employee Relations Office. His/her transfer request will receive equal consideration with all other applicants.

E. JOB DESCRIPTIONS

Job Descriptions must be on file in the Employee Relations Office for every job category listed on the Administrative/Supervisory Personnel Salary Schedule. They shall be reviewed and revised, if necessary, and shall be available upon request.

Job descriptions for advertised vacant positions will be sent on request to interested parties by the Employee Relations Office.

State certification requirements, education background and degrees, administrative or supervisory experience required, and such other professional requirements as may be pertinent to the position shall be part of the job description.

F. PROBATION

The probationary period will be the first six months of employment for any administrative position, after which the administrator must be told whether or not s/he will continue in his/her position after the term of his/her contract. At least one evaluation shall be made near the end of the probationary period.

G. PRIVATE BUSINESS

Administrators who have a financial interest in a private business or who are employed by a private business will not use any district facilities, equipment, property, supplies, or labor in any way which can be construed as supporting the private business activity of the employee. Similarly, administrators will not use their positions in the school district or school district time to solicit private business. Administrators engaged in a private
business will not use their positions to require work to be performed by students for the support of the private business.

H. RECLASSIFICATION OF ADMINISTRATORS

1. Distinction between Promotion and Reclassification.

   a. Promotion occurs when an employee is moved from one assignment to a higher assignment with greater responsibility. Promotion applies to an individual employee.

   b. Reclassification occurs when a person is relocated either higher or lower on the salary schedule. Reclassification applies to a position and affects all employees holding that position and new position holders.

   Positions as such are reclassified; individuals are not.

2. Requests for Reclassification

   Reclassification of a position may be requested whenever a condition exists in which the parties requesting reclassification can demonstrate that the compensation for the position is not commensurate with the current or anticipated duties, responsibilities, authority, and/or line-staff relationships with other positions within the school, division, or District.

I. CO-ADMINISTRATOR

   A co-administrator can be appointed, as deemed necessary by the Superintendent. The co-administrator's position will follow district procedures of advertising and interviewing as indicated in this Handbook.

J. ADMINISTRATIVE MOVE

   The Superintendent shall have the authority to move administrators as deemed necessary. These moves are separate from job performance and the administrator shall continue to be paid the current contract amount or be elevated to the new salary.
K. TERMINATION

1. If an administrator is to be terminated at the end of the fiscal year, a written notice of termination shall be sent to the administrator on or before April 15 of a given year. Termination of a contract during the school year for breach of contract requires 30-day notice by either party.

2. The administrator has the right to know the valid and demonstrable reasons for his/her dismissal. Documentation listing the deficiencies must be provided to him/her. After the administrator has had at least thirty days to correct the deficiencies, further documentation shall be provided as to the successful or unsuccessful correction of the deficiencies.
CHAPTER FOUR
ADMINISTRATOR BENEFITS

A. PROFESSIONAL GROWTH

Programs shall be established which provide professional growth opportunities for administrators to grow personally and professionally. Programs will be such that the professional/personal growth of administrators is an ongoing, meaningful program.

B. WORK DAYS

The normal workday shall be eight hours, except for summer schedules, excluding lunch. However, working hours shall be flexible because of the scope, complexity, and variety of responsibilities of the administrative personnel positions.

C. WORK YEAR

The work year for 10-month administrators shall be 20 paid days longer than the teachers' contract year. The specific days to be worked will be determined by the immediate supervisor with notification to the Employee Relations Division.

The work year for a 12-month administrator shall be a full calendar year of 52 weeks, including 23 days of paid vacation.

Administrators shall not be required to work on any holiday or Board-declared employees' recess day as identified in the annual school calendar, as approved by the Governing Board.

D. VACATION

All 12-month administrators will have 23 days of paid vacation accumulated at the rate of 1.916 days per month. All vacation earned between July 1 and June 30 of each year must be used prior to June 30 of the following fiscal year, except that five (5) days of each year's vacation may be accumulated up to a maximum of thirty (30) days beginning with the 1986-87 school year. The accumulated days are to be used for vacation only.
E. SALARY

It is the policy of the Governing Board to maintain a salary schedule for its administrators which compares favorably with salaries in school districts in cities of comparable size and economic conditions.

The salary schedule has three (3) components:

1) four steps in which one step is added each year with the elimination of the lowest step.
2) two education increments
3) three experience increments

A new Phoenix Union High School District administrator shall be placed on the first step and receive the appropriate educational and experience increments. The experience increments will be given for 5, 10, and 15 years of administration, either in the District or at any other institution.

Educational increments will become effective only at the beginning of each fiscal year. Written evidence of the attainment of the degree or of the additional hours beyond the degrees shall be submitted by November 1 of the fiscal year in which the educational increment is granted.

Credit toward educational increments may be granted for academic credit only.

Evaluation of all credits and professional experience for earning the educational increments outlined will be made by the Employee Relations Division.

F. EXPENSE REIMBURSEMENT

Those administrators required to drive personal cars on a regular basis in the course of their employment by the District shall be authorized to drive a District vehicle or receive mileage reimbursement as established by the Governing Board. These names must be on the list of those approved to receive reimbursement.

G. PROFESSIONAL MEMBERSHIP

The Governing Board shall provide each administrator membership in the American Association of School Administrators, both national and local levels. Other professional education organization membership fees shall be paid up to the amount of $500 per calendar year.
H. PHYSICAL EXAMINATION

A complete physical examination will be provided annually for all administrators.

I. EARLY RETIREMENT PROGRAM

After ten (10) consecutive years of full-time satisfactory service in the Phoenix Union High School District, an administrator who elects to take retirement prior to age 65 will be eligible for participation in the Early Retirement Program. The administrator will sign an agreement to work up to a maximum of forty (40) days during a fiscal year. The administrator will be paid a daily rate of pay at the negotiated rate (currently $200 a day) of service.

The District will pay individual health and major medical and life insurance premiums for participants in the Program for the first year of participation, and will continue to pay the individual premiums until age 65, as long as the administrator worked one or more days during the previous school year. Dependent coverage will be available by direct monthly payment to the District payroll department.

J. UNUSED PAID LEAVE PAYMENT

An administrator with continuous satisfactory service at the time of resignation, retirement from the District, or death in service shall receive (or his/her estate) a financial payment equivalent to the negotiated rate (currently 25%) of the accumulated unused paid leave times the duty day rate of pay during the final year of employment. Unused vacation days shall be paid to the administrator at 100% of daily rate of pay.

K. RESIGNATION AND/OR RETIREMENT

Administrators who plan to retire from their employment with the District at the end of a contract year are expected to notify the Employee Relations Office and their supervisor by April 1. Subject to the approval of the Governing Board, certificated administrators shall be permitted to resign while under contract providing the District is given 30 days' notice (classified administrators will give 14 days notice) and providing a suitable replacement can be found.

L. LIFE INSURANCE

The Governing Board shall provide, at no cost to the administrator, group term life insurance as described in the master contract between the District
and the Provider in the amount of the negotiated rate (currently equal to the annual salary to the nearest $1,000) up to $100,000 maximum.

M. SUPPLEMENTAL DISABILITY INSURANCE

The Governing Board shall provide, at no cost to the employee, group supplemental disability insurance coverage as described in the master contract between the District and the Provider which will pay two-thirds of the contract salary after a minimum of a 90 calendar day waiting period or extension of sick leave to a maximum of 180 calendar days. The conditions of coverage will be spelled out in a booklet to be provided every administrator.

N. EQUIPMENT CHECKOUT

Administrators will be allowed to check out District equipment (such as a computer) in order to become more proficient with its use. Permission of their immediate supervisor must be obtained and the administrator must carry sufficient personal home owners insurance to cover replacement cost should the equipment be stolen, vandalized or burned.

O. CONSULTING DAYS

Administrators are allowed 5 paid days to consult with other agencies and/or school districts. These consulting days are available each calendar year of employment and shall be in addition to paid leave and vacation described elsewhere in Chapter 4 in this handbook. Any administrator utilizing a consulting day will notify their immediate supervisor and Employee Relations Office.

P. EMPLOYEE BENEFITS

District Policies (See Appendix C.)

Q. TRAVEL FUNDS

The Administrators' Association will be responsible for supervision of all AdA travel funds.
CHAPTER FIVE

APPEALS

A. APPEALS GENERAL

1. Purpose

The purpose of an appeal policy is to obtain, at the nearest administrative level, equitable solutions to the problems which may from time to time arise. The Board, Administration, and AdA agree that these proceedings will be kept as informal and confidential as may be appropriate at any level of the procedure.

2. Informal Discussion

Nothing contained herein will be construed as limiting the right of any administrator having an appeal to discuss the matter informally with any appropriate member of the administration and having the appeal adjusted, provided the adjustment is consistent with the educational policies and the conditions contained in this handbook.

3. Reprisals Prohibited

Reprisals shall not be taken against any administrator, employee, any party in interest, AdA representative or any other participant in the appeal procedure by reason of such participation.

4. Time Limits

a. Appeals, whether formal or informal, should be processed as rapidly as possible in the interest of good morale. Therefore, the number of days indicated at each step of the procedure is a maximum, and every effort should be made to process the appeal more rapidly.

b. The time limits specified may be extended by mutual agreement between the Superintendent and the AdA President, or their designees, in writing.

c. Every effort must be made so that all appeals are resolved prior to June 30 of the school year in which the appeal is initiated. Some appeals left unresolved until the beginning of the succeeding school year could result in irreparable harm to a party or parties of interest.
For any formal appeal filed on or after June 1, the time limits listed herein will be reduced so that the appeal procedure may be concluded prior to June 30 of the current school year.

5. Closed Sessions

All sessions held in connection with the processing of appeals shall be closed sessions and no news releases shall be made concerning the progress of the hearing.

6. Representation

Any party of interest may be represented at any level of the formal appeal procedure by a person or persons, of his/her own choosing.

7. Filing of Appeal Matter

All written and printed matter dealing with the processing of an appeal will be filed in the Employee Relations Office.

8. Relevant Information

At every level of the appeal procedure, the Board agrees to make available to the appellant and representatives all pertinent information, not privileged under law, in its possession or control and which is relevant to the issues raised by the appeal.

9. Release from Duty

If it is necessary for an appellant or representative(s) of the AdA to attend meetings or hearings called by the Superintendent or the Board during a working day, the immediate supervisor should be so notified by the Superintendent, and these persons will be released from duty without loss of pay for such time as their attendance is required at such meetings or hearings.

10. Withdrawal

An appeal may be withdrawn at any level without prejudice of record and cannot be reopened.
11. Failure to Appeal to Next Level

Failure by the appellant at any level to appeal to the next level within the specified time limits herein shall be deemed to be acceptance of the decision rendered at that level.

B. INFORMAL COMPLAINT PROCEDURE

1. If any member of the AdA has a complaint which s/he feels may become a formal appeal, s/he must first discuss the problem in person with immediate supervisor, the one to whom s/he reports directly, in a sincere and conscientious effort to resolve the matter informally. At the option of the employee, the employee may discuss the item with the President of AdA.

2. This complaint must be initiated within five days after the complainant knew, or should have known, of the act or conditions on which the complaint is based. If not so presented, the opportunity to present the matter as an appeal is waived.

3. The party of interest to whom the complaint is presented at this first level of the informal procedure shall have up to five days to answer the complaint.

4. If there is more than one level of supervision or administration at the unit (e.g., the School, the District Administrative Office, the District Service Office or its annexes) at which the complainant is working, the complainant, if not satisfied with the proposed resolution at this first level, must take the complaint in person to whom his/her immediate Supervisor is responsible within five days after first answer is received.

5. The immediate Supervisor will have up to five days to answer, in person, the complaint.

6. The complainant must exhaust all the administrative remedies available at the unit at which s/he works before s/he may use the formal appeal procedure.

7. If the complainant is not satisfied with the administrative remedies proposed in answer to his/her complaint at the unit level, s/he shall have ten days within which to present appeal in writing and enter it into the formal procedure.
C  FORMAL APPEAL PROCEDURE

1. Level One – the Superintendent/Designee

   a. If the complainant, having exhausted all levels of administrative remedies at the unit at which s/he works, is not satisfied with the outcome of the informal procedure, s/he may present his/her appeal in writing to the Superintendent.

   b. Copies of this appeal must also be sent simultaneously to the Employee Relations Office and the President of AdA or his/her designee.

   c. The appellant may request a conference with the Superintendent prior to the rendering of a decision by the Superintendent. The appellant may (1) discuss the appeal personally, or (2) request that a representative of AdA accompany him/her and may also request that the AdA representative act on his/her behalf.

   d. The appellant must submit the appeal in writing (1) within 10 days after s/he has exhausted the administrative remedies by having received an unsatisfactory answer at the highest unit administrative level, or (2) within 25 days after the appellant knew, or should have known, of the act or condition on which the appeal is based, whichever comes later.

   e. The Superintendent, within 20 days after the receipt of the appeal or within 20 days after the personal conference, shall render a written decision to the appellant, with copies to the Employee Relations Office, the President of the AdA, and to the Administrator or Supervisor rendering a decision in the informal procedure.

2. Level Two – Board Appointed Hearing Officer

   a. If the appellant is not satisfied with the disposition of his/her appeal at Level One, s/he may, within five (5) days after the receipt of the Superintendent’s (or designee) decision, request in writing to the appropriate representative of AdA that the appeal be submitted to a hearing officer appointed by the Board.

   b. The hearing officer will have authority to hold hearings and make procedural rules. The recommendations will be issued within a reasonable time after the date of the close of the hearing.

   c. The hearing officer's recommendations shall be submitted in writing as soon as possible to the Board, with a copy to the appellant, and
shall set forth the findings of fact, reasoning and conclusions on the issues submitted. The hearing officer's recommendations shall be consistent with existing Statutes.

3. Group Appeal

   a. If an appeal affects a group of persons from among the administrative personnel from more than one unit, the AdA may submit the appeal in writing directly to the Superintendent as an appeal at Level One, using the appropriate form.
All leaves of absence granted under this section shall be in units of full days or half days.

A. LEAVE WITH PAY

1. Paid leave may be used for personal illness or injury, family illness, parental obligations, family death or personal business.

2. Each administrator shall earn one day of paid leave allowance for each twenty (20) contract days, or major fraction thereof. A minimum of twelve (12), thirteen (13), or fifteen (15) days paid leave will be available for use by each administrator at the beginning of and depending on the contract period. To be eligible for this advance, the administrator must be on duty the first contract day or have an excused absence. If the administrator leaves the employ of the District before the end of the contract period during which this advance would have been earned, s/he will have the final paycheck reduced by the amount of pay received for paid leave days used but not yet earned. The unused portion of such allowance shall accumulate from year to year without limitation.

At the beginning of the year, each continuing administrator shall be advised in writing of the number of days of unused paid leave which s/he has accumulated. For regular part-time and interim employees, paid leave is prorated according to the percentage of full-time being worked.

3. If the Superintendent, or his designee, has reason to believe that an administrator has violated or misused this paid leave policy, s/he may require from the employee a certificate signed by a duly licensed physician or Christian Science Practitioner verifying the cause of the absence from duty of an administrator claiming illness or injury for one or more days. The administrator may also be required to have a health examination by the District Medical Advisor at no cost to the employee. The administrator shall be notified of this requirement in writing, including a statement citing just cause, and a copy of this notification shall be sent to the representative group.

In the event that it can be shown that the administrator willfully violated or misused this paid leave policy, or misrepresented any
statement or condition under this policy, s/he may be subject to disciplinary action.

4. Paid leave may be used for disability of the employee. If a disability period is known in advance (e.g., scheduled surgery), the administrator shall notify his/her immediate supervisor who, in turn, shall notify the Assistant Superintendent of Employee Relations as soon as possible.

In the event that an administrator does not have sufficient accrued paid leave to cover the disability period, the administrator may request a leave of absence without pay to cover the disability period.

5. Any case of assault upon an administrator shall be promptly reported to the Board or its designee. The Board shall promptly render all reasonable assistance to the administrator in connection with handling of the incident by law enforcement and judicial authorities. Time lost by an administrator in connection with a student disciplinary incident shall not be charged against the paid leave of the administrator.

B. LEAVES OF ABSENCE WITHOUT PAY

1. Any administrator who must be absent without pay, for any period, must request a leave of absence without pay or submit a resignation. To do otherwise is a breach of contract. This also applies to employees who have exhausted their paid leave allowance. A health leave of absence without pay must be requested to be effective as soon as the leave allowance is exhausted.

2. All requests for leaves of absence without pay shall be applied for in writing, using the appropriate form, and the request may not exceed one year. Those who have requested leaves of absence without pay will be informed in writing as to the disposition of the request.

Extensions of leaves of absence without pay beyond one work year are not permitted except for administrators on health leave or elected to public office. Administrators on leave of absence eligible for an extension of leave beyond one year must request the extension in writing, or indicate in writing they are returning from leave as scheduled, by April 1. No contract will be issued nor will consideration be given to extending the leave if an employee fails to extend their leave (by written request).
3. No request for a leave of absence without pay will be processed unless it has the signed approval of the immediate supervisor. If the leave of absence request is recommended by all parties concerned, including the Employee Relations Office, the Superintendent will submit the request to the governing Board for action.

4. An administrator who is granted a leave of absence for one semester or one work year will not break his/her continuity of service. The administrator will be returned to his/her former assignment, and the acting administrator employed or transferred as a replacement for the administrator on leave will be employed or transferred only for the duration of the period of the leave, and will be so informed in writing.

If an administrator is granted a health leave of absence beyond one year, upon availability for duty, s/he will be placed in the first vacancy in the District for which s/he is qualified.

5. If the leave is granted, all rights of tenure, retirement, accrued leaves with pay, salary increments, and other benefits provided by law shall be preserved and available to the administrator after the termination of the leave of absence.

6. An administrator on a leave of absence without pay, other than a health leave, may make arrangements with the payroll office to continue individual (and dependent coverage) under the District group health and major medical insurance plan during the leave period by submitting payment for the premium(s) prior to the beginning of each month's coverage.

7. Leaves of absence without pay for any reason other than health or maternity will not be granted to administrators with less than three years continuous employment except in unusual circumstances.

C. TYPES OF LEAVES OF ABSENCE WITHOUT PAY

Leaves of absence without pay may be requested under the following circumstances.

1. An administrator who is unable to work because of a personal illness or disability and who has exhausted all paid leave available (or who has chosen not to use accumulated paid leave), upon the submission of a physician's certificate may request leave for the remainder of the school year or until s/he is able to return to duty.
An administrator who becomes eligible for consideration for the District's long-term disability insurance program must apply for a health leave of absence to begin upon the exhaustion of leave.

2. An administrator who is injured while on duty and covered by industrial compensation insurance will not be granted a health leave of absence until his/her paid leave is exhausted, or until the administrator becomes eligible for coverage under the long-term disability insurance program, whichever comes first.

3. For maternity leave beyond the period of disability charged to paid leave or in lieu of paid leave.

4. For the adoption of a child.

5. To care for a sick member of the employee's immediate family.

6. To an administrator designated by the Representative group for the purpose of engaging in a local, state, or national association activity.

7. To campaign for or serve in a county, state, or national elective office.

8. To serve in the Peace corps or similar government-approved activity.

9. To secure additional education.

10. Other requests not listed above will be considered on their merit.

The request for such leave should be submitted as far in advance of the departure date as possible to permit filling the vacancy in a timely manner.

D. TEMPORARY LEAVES OF ABSENCE

The Board recognizes that participation by administrators in the activities of professional organizations, through services on committees, boards, and commissions, as well as the continuation of their education, contribute to the professional growth of the staff and to the improvement of instruction.

E. MILITARY LEAVE

Military leaves of absence shall be granted by the Board to an administrator in accordance with existing state and federal statutes.
F. JURY DUTY OR OFFICIAL SUBPOENA LEAVE

Administrators who are required to serve on jury duty or to appear in court during their normal work hours or work day in response to an official subpoena will receive full salary during their period of such service, subject to the deduction from their regular pay an amount equal to the compensation paid them for such duty.

An administrator who must appear in any legal proceeding connected with his/her employment with the School District may be absent without loss of pay for that cause, if the administrator is required to attend.

G. NATURAL DISASTERS

If a natural disaster makes it impossible for administrators to report for work, the board may provide additional day(s) of paid leave for the enforced absence(s).
APPENDIX A
GLOSSARY OF TERMS

(a) AdA shall mean Administrators' Association of the Phoenix Union High School District.

(b) "Acting administrator" shall mean any qualified personnel placed in an administrative position on a temporary basis.

(c) "Administrator" shall mean personnel hired by the District to perform management functions.
   (1) A certificated administrator has a state certificate in school administration.
   (2) A classified administrator is a non-certificated administrator.

(d) "Appeal" shall mean any claim by a member of the Association that there has been a violation, a misinterpretation, or inequitable application of any of the provisions of this written Administrative handbook or of any policies of the Governing Board.

(e) "Appellant" is any administrative employee in the District requesting an appeal.

(f) "Complainant" is an administrative employee who channels a complaint through the informal appeal procedure.

(g) "Board" shall mean the Phoenix Union High School District Governing Board.

(h) "Days" as used in this handbook shall mean working days when the offices are open.

(i) "Duty day rate of pay" is obtained by dividing the administrative annual salary by the number of actual work days during the contract year.

(j) "Professional Compensation" shall mean all salaries and fringe benefits.

(k) "Reprimand" shall mean any written report that is placed in the Administrative personnel file that explains disciplinary action taken by an immediate supervisor against the administrator for infraction of rules or delinquency in professional performance.

(l) "Seniority" is defined as the length of service in any job category as determined by the date the administrative employee was hired into that position, including the time spent in acting status in the same position/category.
APPENDIX B
ARIZONA SCHOOL ADMINISTRATORS
ETHICS COMMITTEE

AdA CODE OF ETHICS

POLICY 1. The Professional School Administrator Constantly Upholds the Honor and Dignity of His Profession in All His Actions and Relations with Pupils, Colleagues, School Board Members, and the Public.


POLICY 4. The Professional School Administrator Strives to Provide the Finest Possible Educational Experiences and Opportunities to All Persons in the District.

POLICY 5. The Professional School Administrator Applying for a Position or Entering into Contractual Agreements Seeks to Preserve and Enhance the Prestige and Status of His Profession.

POLICY 6. The Professional School Administrator Carries Out In Good Faith All Policies Duly Adopted by the Local Board and the Regulations of State Authorities, Recommends Policy and Regulatory Changes When Appropriate, and Renders Professional Service to the Best of His Ability.

POLICY 7. The Professional School Administrator Honors the Public Trust of His Position Above Any Economic or Social Rewards.

POLICY 8. The Professional School Administrator Does Not Permit Considerations of Private Gain nor Personal Economic Interest to Affect the Discharge of His Professional Responsibilities.

POLICY 9. The Professional School Administrator Recognizes That the Public Schools Are The Public’s Business and Seeks to keep the Public Fully and Honestly Informed About Their School.

APPENDIX C
EMPLOYEE BENEFITS

Industrial Commission Insurance

<table>
<thead>
<tr>
<th>Time Missed</th>
<th>Compensation from Industrial Commission</th>
<th>Compensation from School District</th>
<th>Charge Against Sick Leave Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 8 calendar days.</td>
<td>None.</td>
<td>Base pay for time missed until sick leave expires.</td>
<td>Day for day on time missed. Example: 5 work days missed—charge sick leave 5 days.</td>
</tr>
<tr>
<td>8 through 13 calendar days.</td>
<td>A percentage of the employee's pay as determined by the Industrial Commission formula, excluding the first 7 calendar days.</td>
<td>Balance of base pay for 8th through 13th calendar days until sick leave expires.</td>
<td>For that portion of time compensated by District. Example: 8 work days missed—charge sick leave 5 full days plus 0.35 x 3 = 1.05, or a total of 6 days. District paid 35% of wages.</td>
</tr>
<tr>
<td>14 calendar days or more.</td>
<td>A percentage of the employee's pay as determined by the Industrial Commission formula, including the first 7 calendar days missed.</td>
<td>Balance of base pay for all of the time missed until sick leave expires. Difference of base pay and that paid for by the Industrial Commission.</td>
<td>For that portion of time compensated by District. Example: 20 work days missed—charge sick leave 0.30 x 20 = 6 days. District paid 30% of wages.</td>
</tr>
</tbody>
</table>

Note: Sick leave charged is same percentage as compensation paid by the District. Payroll will round to the nearest half-day in adjusting sick leave account in accordance with this schedule.

Work on Holidays and Governing Board-Declared Recess Days

Employees shall not be required to work on any holidays or Governing Board-declared recess days as identified in the annual school calendar as approved by the Governing Board. Any 10-month administrator or supervisor who is asked to work during the Christmas or spring recess period shall be given equal time off at another time during his work year that is mutually agreeable to him and his immediate supervisor. Arrangements shall be made at the discretion of the administrative staff of each campus.
Employee on District payroll. If an employee is on the District payroll (i.e., pay) either for the last workday immediately preceding or the first workday immediately following a holiday or Governing Board-declared recess period as identified in the Governing Board-approved school calendar for the year, the employee's compensation will not be diminished because of the holiday or Governing Board-declared recess period.

Employee not on District payroll. If an employee is not on the District payroll (i.e., on a leave of absence without pay either because the sick leave for which the employee is eligible has been exhausted or because the employee is on a Governing Board-approved leave of absence without pay) on the last day prior to and the first day immediately following a holiday or a Governing Board-declared recess period as identified in the Governing Board-approved school calendar for the year, that employee shall receive no compensation for the holiday or the Governing Board-declared recess period.

Absence before and/or after recess or holiday. Employees must work the last scheduled workday before and the first scheduled workday after any holiday or recess identified in the official school calendar(s), unless they are ill. The District reserves the right to require from the employee a certificate signed by a duly licensed physician or Christian Science practitioner to authenticate this type of absence. Only in very unusual circumstances will any other type of absence be excused.

Unexcused absence from duty. If an employee is not on duty on any workday(s) and his absence is not a result of any approved leave of absence, including paid leave for which the employee is eligible, that employee shall not be paid for such workday(s).

Vacation for Employees on Twelve-Month Assignment

All employees working under a 12-month contract will receive a number of vacation days as described in the respective handbooks.

In cases where a 12-month contract is not issued, but rather a series of continuing contracts for continuation of a particular certificated job assignment (which will exclude summer school, short-term extended assignments into the summer, and summer workshops) that is the equivalent of a 12-month contract, the employee will accrue vacation from the date of the first such contract on the basis of 1.9 days per month, to a
total of 23 days for a 12-month assignment. If an employee continues under contract in a District job assignment beyond a 12-month period, he will continue to accrue vacation until such contracts expire.

Vacation may be taken only after it has been earned (1.9 days per month of service) and only with the prior approval of the principal or supervisor.

For employees in some 12-month positions that are funded from nonlocal funding from one year to the next, it is mandatory that the earned vacation be taken during the nonlocal grant's fiscal year.

**Insurance Programs**

**Group health and major medical insurance coverage.** All permanent employees of the District are covered individually in the group health and major medical program as described in the master contract(s) between the District and the provider(s). (Permanent employee status is defined in the Administrative Handbook.)

New employees are eligible for personal coverage based on the starting date of their employment indicated on the Governing Board agenda in accordance with the following:

- If employment began between the 1st and 15th of the month, insurance coverage begins the first day of the following month.

- If employment began after the 15th day of the month, insurance coverage will begin the first day of the second month.

New employees are eligible to enroll their dependents for dependent coverage. The employee has thirty (30) days following the starting date of employment to decide whether or not he desires dependent coverage. Effective date of coverage will be determined as follows:

- If the employee has filled out the form to enroll dependents for dependent coverage between the 1st and 15th of the month, the dependent coverage begins the first of the following month.

- If the employee has filled out the form to enroll dependents for dependent coverage after the 15th of the month, dependent coverage will begin the first day of the second month.
Employees terminated will have employee and/or dependent coverage through the date designated by the Employee Relations Division at the time the employee terminates. No refund will be given, nor will any additional charge be made.

Employees who desire to drop dependent coverage must initiate a signed form obtained from the Employee Relations Division.

Dependent enrollment forms have been drawn up and are available in the Employee Relations Division.

Full-time employees who have fulfilled their contract obligations for a full year and who are terminated from the District due to reduction in force shall receive their health insurance benefits for the full year (October 1 through September 30).

Brochures are available in the Employee Relations Division covering all phases of the medical insurance.

**Tax-sheltered annuity.** Employees of the District who wish to participate in the tax-sheltered annuity program must submit an "Amendment to the Employee Contract."

△△ The District is presently participating in the tax-sheltered annuity program approved by the Internal Revenue Service. The Employee Relations Division will furnish details.

△△ Employees of the District may, at their option, participate in a tax-sheltered annuity program approved by the Internal Revenue Service. Payment is made by the employee to an eligible company chosen by the employee, under a payroll deduction plan.

△△ Employees hired prior to July 1, 1987, may elect to take a revision of their contract in lieu of health/medical insurance benefits, with an agreement that the increased amount will be placed in a tax-sheltered annuity and remain in the annuity program for the duration of employment in the District.
The TSA amount shall be equal to $1,177.00 for a full year contract or an amount proportionate based upon the date of exercise of the option as follows:

A. Between the first and fifteenth of the monthly TSA effective the first of the following month.

B. Between the sixteenth and last day of the month, TSA effective the first of the second following month.

Life insurance. The Governing Board shall provide, at no cost to the employee, group term life insurance as described in the master contract(s) between the District and the provider.

Full-time employees who have fulfilled their contract obligations for a full year and who are terminated from the District due to reduction in force shall receive their life insurance benefits for the full year (October 1 through September 30).

Supplemental disability insurance. The Governing Board shall provide, at no cost to the employee, group supplemental disability insurance coverage as described in the master contract between the district and the provider which will pay two-thirds of the contract salary after a minimum of ninety (90) calendar days waiting period following disability for either sickness or accident to age 65 or a maximum of 180 calendar days. The conditions of coverage will be spelled out in a booklet to be provided every employee.

Pre-tax Flexible Benefits

The District offers for the benefit of all employees a flex benefit plan which allows those employees to pay for tax-deductible expenses from pre-tax dollars. To enroll in the flex benefit plan, a flex benefit agreement must be signed and submitted to Employee Relations.

Leaves of Absence

The various components of the leave-of-absence regulations are contained in the Administrative Handbook.
Early Retirement Part-Time Employment Program

After ten (10) consecutive years of full-time satisfactory service in the District and attaining the age as described in the applicable handbooks, an employee who opts to take retirement prior to age 65 will be eligible for participation in the early retirement program. Application is made through the Employee Relations Division.

Other Fringe Benefits

Payment for unused sick leave upon retirement, resignation, or death in service.

- An employee with ten (10) or more years of continuous satisfactory service at the time of retirement or resignation from the District or death in service (or his/her estate) shall receive a financial payment as provided for each employee group. Paid leave shall be cumulative indefinitely for normal use.

- An employee (or his/her estate) with fewer than ten (10) years of satisfactory service shall, upon termination of employment from the District or death in service, be paid as provided in the Administrative Handbook.

Admission to school events. District employees and retired employees shall be issued an identification card that shall entitle the holder to free admission to authorized District activities.

Tuition waiver. The District will waive the amount of tuition that is the District levy per student for all students entering the District prior to 1985 who are the natural children of, who are legally adopted by, or who are under the legal guardianship of an employee who lives outside the District. If such child has an exceptionality that requires special tuition rates, the parent will be exempt from the normal tuition rate only.

Revised: May 28, 1987; 2d rev., December 1, 1988; 3d rev., June 29, 1989
APPENDIX D

EMPLOYMENT OUTSIDE OF DISTRICT CONTRACTUAL ASSIGNMENTS

All employees are assumed to devote their energies to the performance of their assigned duties. Should any employee of the District accept additional remunerated employment outside of duty hours, the following shall apply.

Nature of the Outside Work

The nature of the work must be such as not to interfere with the demands of District duties as determined by the administration.

Work and Health

The work must be such that it does not sap the vitality of the individual for the performance of his District duties as determined by the administration.

Evening Teaching Assignments

An administrator shall be permitted to accept an evening teaching assignment after regular school hours provided the employee has the prior approval from his immediate supervisor. Administrators also must have the prior approval of the Superintendent.

Tutoring

An employee may engage in remunerative tutoring providing:

- All tutoring is done outside of regular school hours.
- All tutoring is done off campus.
- The student is not one of the employee's students, with the exception of music students.

- The Governing Board directs the administration to provide safeguards to assure that equal opportunity is provided each student in every music department where a teacher may be involved in tutoring or private lessons.

- The written consent of his principal is obtained.
Summer School

Continuing teachers, probationary teachers, and classified employees may apply for summer school positions that are posted.

Selection and assignment shall be made on the basis of the application, experience, and the interview.

Preference shall be given to current District employees.

Revised: December 1, 1988
# Phoenix Union High School District Calendar 1989/90

## Code:
- **Legal Holiday**: ●
- **Term Marker**: □
- **School Recess**: ○
- **Exam Days**: ◇
- **Report Preparation, No Classes**: ◯
- **Teacher In-Service, No Classes**: ◆
- **New Teacher Orientation**: ▲

### Dates and Days Taught:

<table>
<thead>
<tr>
<th>Month</th>
<th>Days Taught (ADA/ADM)</th>
<th>Teacher Duty Days</th>
<th>Holiday and Recess Days</th>
<th>Term Dates</th>
<th>Term Days</th>
<th>Semester Days</th>
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<td>20</td>
<td>20</td>
<td>0 0</td>
<td>04/23</td>
<td></td>
</tr>
</tbody>
</table>

### Total Days:
- 175 (Teacher)
- 181 (Student)
- 23 (Term)
- 25 (Semester)

---

*Approved by Governing Board 3/16/89*
I. PROCEDURES FOR INITIATING TRAVEL REQUESTS

A. TRAVEL REQUEST FORMS

District personnel representing the District in any capacity must submit a travel request for any destination outside the metropolitan area whether there is expense to the District or not. The metropolitan area is interpreted to include Avondale, Chandler, Dysart, Gilbert, Glendale, Goodyear, Laveen, Litchfield Park, Mesa, Paradise Valley, Peoria, Scottsdale, Sun City, Sunnyslope, Tempe, Tolleson, and Youngtown. When any expense is involved for travel within the Metropolitan area, a travel request must be submitted to the principal or supervising administrator who will forward the pink copy to the Accounts Payable to initiate payment or reimbursement.

B. AdA, CEA, AND CTA RECOMMENDED ALLOCATIONS

The AdA, CEA, and CTA will recommend the allocation of budget travel monies for their respective groups to the Assistant Superintendent for Instruction. The Assistant Superintendent for Instruction has jurisdiction over all in-state travel; however, final approval for out-of-state travel rests with the Governing Board. The lists of travel being requested by the CTA and AdA should be in the office of the Assistant Superintendent for Instruction no later than June 1 for all travel requested during the period from July 1 through October 30, and no later than October 1 for all travel requested during the period from November 1 through June 30 of each school year. Travel reimbursed from non-local funding; i.e., V.E.A., Chapter I, etc., must also be approved either by the Assistant Superintendent for Instruction or the Governing Board. During the year, both CTA and AdA may recommend for reallocation funds unused earlier in the year by their respective group members.

C. PERSONNEL ELIGIBLE FOR REIMBURSEMENT

Only District personnel under contract are eligible for reimbursement from District funds. An employee approved to travel while not under contract must be issued a short-term non-paid contract prior to the travel in order to qualify for reimbursement as well as insurance coverage.
D. USE OF DISTRICT VEHICLES

If available, District vehicles may be provided for approved travel within the state. Approval for District vehicles to go out of state will be on recommendation of the appropriate administrator to the Assistant Superintendent for Instruction. Recommendations will be based on a careful analysis of distance, safety factor, time, and economics. In all instances, vehicles should carry only the number of passengers for which that vehicle is rated. Failure to comply with this requirement and normal safety regulations may be construed as gross negligence.

F. PRIOR APPROVAL

When a District employee travels without prior approval, s/he is not covered by insurance and will lose a day’s pay for each workday missed.

G. PRELIMINARY REQUEST FOR TRAVEL FUNDS

District personnel wishing to travel at District expense should first submit a preliminary request for travel funds to their respective association (AdA, CEA, or CTA). Only when they receive verification that they are being recommended for reimbursement should they submit a travel request form (M-s) through their Principal or Supervising Administrator. Travel outside a 50-mile radius must have the approval of the Assistant Superintendent for Instruction and be received in that office no less than 21 school days prior to travel.

H. TRAVEL REQUESTS TO BE FILLED IN COMPLETELY

Travel requests should be filled in completely and accurately and a copy of the program conference, or field trip itinerary attached whether the travel is in or out-of-state. Travel requests that are incomplete or incorrect will be returned to the Principal or Supervising Administrator. Once the travel request form is approved by the principal and assistant superintendent, a copy is to be attached to the requisition for payment of airfare and/or registration fees if these items are to be paid by the District through a purchase order rather than as reimbursed to the employee.
II. PROCEDURES FOR REIMBURSEMENT OF TRAVEL EXPENSES

This procedure applies only to employees who have submitted a Travel Request Form and received approval for travel. Exceptions to these procedures must be approved in advance by the Superintendent or the Assistant Superintendent for Instruction.

A. TRAVEL ARRANGEMENTS

1. AIR, RAIL, BUS TICKETS

   Reservations for travel should be made by the traveler through a District approved travel agency. Travelers may pay for tickets with reimbursement after completing a travel claim, or travelers may have the District purchase the ticket in advance. To allow District purchase of a ticket(s), an approved requisition must be sent to the Budget Division, with a copy of the approved travel request.

2. REGISTRATION FEES

   Registration fees that are travel-related may be paid by the traveler with reimbursement after completing a travel claim, or the traveler may have the District purchase the registration fee in advance. To allow District purchase of registration, an approved requisition must be sent to the Budget Division with a copy of the approved travel request form attached. In addition, the traveler must indicate on the requisition (when paid by District) or on the receipt (when paid by traveler) what lodging and meals, if any, are included in the Registration Fee.

3. ALL OTHER

   All other arrangements are the responsibility of the traveler. See the District Travel Regulations regarding use of District vehicles.

B. ENTITLEMENT FOR REIMBURSEMENT OF TRAVEL EXPENSES

The expense categories which are reimbursable and the maximum amounts which may be reimbursed are:

1. GENERAL

   Employees will be reimbursed by the District for the lesser of (1) the total amount approved as District expense for the trip, or 2) the total of the amounts allowed per the entitlements below.
2. MILEAGE

After proper approvals, mileage for an employee's car will be paid at the current approved rate for the most direct, usually traveled route.

3. COMMERCIAL CARRIERS

Actual cost not to exceed the coach fare will be paid for the most direct, usually traveled route.

4. SUBSISTENCE

Subsistence expense includes the cost of lodging and meals (including tips). The subsistence entitlement is intended to provide reimbursement of actual lodging and meal expenses within the maximum allowed. The subsistence entitlement varies by law for "in-state" and "out-of-state" travel. All travel within Arizona is considered "in-state." In addition, travel within 100 miles of Arizona's boundaries is considered "in-state" unless lodging is required. For example, travel in California within 100 miles of Arizona's boundaries is considered "out-of-state" if lodging is required. Subsistence entitlement will be determined based on actual expenses for each 24 hours and/or portion of 24 hours the employee is in a travel status. An employee is in a travel status from the time an employee departs from his/her home/place of work to the time an employee returns to his/her home/place of work.

Meal expense is paid for the following:

- Breakfast expense paid if traveler is in travel status at 6:00 a.m.
- Lunch expense paid if traveler is in travel status at 12:00 noon.
- Dinner expense paid if traveler is in travel status at 8:00 p.m.

No payment for meals provided by a commercial carrier or meals included in registration fees may be claimed. Meal receipts are not required. Meal expenses may not include the cost of alcoholic beverages.

If the traveler shares a room with another traveler, an equal portion of the lodging expense will be paid. If a spouse accompanies the traveler, the single rate will be paid if shown on the receipt. Otherwise, the traveler will be entitled to one-half the actual expense.
a. IN-STATE SUBSISTENCE

The maximum subsistence expense (lodging and meals) which may be paid for “in-state” travel is:

<table>
<thead>
<tr>
<th></th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Dinner</th>
<th>Incidental Expenses</th>
<th>Lodging</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN-STATE</td>
<td>$4.00</td>
<td>$5.00</td>
<td>$10.00</td>
<td>$1.00</td>
<td>$40.00</td>
<td>$60.00</td>
</tr>
</tbody>
</table>

b. OUT-OF-STATE SUBSISTENCE

The maximum subsistence expense (lodging and meals) which may be paid for “out-of-state” travel is:

<table>
<thead>
<tr>
<th></th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Dinner</th>
<th>Incidental Expenses</th>
<th>Lodging</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUT-OF-STATE</td>
<td>$5.00</td>
<td>$6.00</td>
<td>$12.00</td>
<td>$2.00</td>
<td>$55.00</td>
<td>$80.00</td>
</tr>
</tbody>
</table>

Exceptions may include:

- Payment of actual lodging expenses in cases where the person is staying in a designated conference hotel, or when the director of a governmental unit determines, in writing, that compliance with the authority must approve reimbursement of actual lodging costs. Traveler must obtain receipts for all lodging expenses.

- “Runzheimer Lodging Costs Index” cities. (See Travel Expense Claim packet provided by Travel Account Clerk.)

5. OTHER ALLOWABLE EXPENSE

The actual costs of parking, luggage storage, telephone, local bus, taxi, or limousine may be paid. For car rental, a receipt is required and payment will be made only if the rental was included in the approved travel request. Receipts are required for registration fees and should be listed in this column. The registration receipt must be annotated to indicate what lodging and meals, if any, are included in the fee.

C. PREPARATION AND SUBMISSION OF TRAVEL CLAIMS

1. Employees approved for travel will be provided with a claim form by the travel account clerk, DSO (271-3305). The claim form must be
signed by the traveler and by the principal or other school administrator. Federal claims must also be approved by the Federal Programs Office at DAO. Claims for travel during May and June must be filed within 72 hours of your return to assure payment. All claims will be forwarded to Accounts Payable after local approval.

2. Complete with ball-point pen or typewriter; submit to Accounts Payable, DSO.

3. Expenses must be listed on a daily basis.

4. Department and arrival times and places must be completed to your destination and return to Phoenix.

5. Meals for each day are to be totaled in the meals column. Do not itemize each meal.

6. The original hotel/motel receipt must be submitted and must be itemized (e.g., daily amounts shown). When sharing a room with another traveler, divide the charges equally and make reference as to names, districts and amounts paid by others. Copies of receipts are acceptable provided one of the travelers files the official receipt. If a spouse accompanies the traveler and the bill indicates what the single rate would have been, the single rate is allowable in lieu of splitting the room charge. If the spouse is also entitled to reimbursement from some other source, expenses are to be divided.

7. Attach your air, rail, or bus ticket to your claim even if the fare is paid by the District.

8. When the traveler’s car is used for travel, the license number and the auto’s owner must be shown on the claim. If reimbursement is to be received for mileage, the “Mileage Schedule” must be filled in daily.

9. Actual expenses may appear in the body of the claim, however, you must reserve the far right column for the “amount claimed.” In that column enter only the amount which you are allowed (Not-to-Exceed Amount).

10. Dates on all receipts must agree with approved travel dates and must not be altered.

Please call the Travel Account Clerk (271-3305) with any questions concerning travel reimbursement.
APPENDIX G

(FOR INFORMATION ONLY)

DIRECT DEPOSIT

The Maricopa County payroll system allows the direct deposit of school employee paychecks into the employee’s checking or savings account at any of a number of banks including savings and loan associations and credit unions.

Any District-contracted employee may use this feature except those whose wages are being garnished or assigned, those who draw part of their salary from CETA sources, those who are paid from Student Activity Funds, and substitute/temporary employees.

Participants in the direct deposit system will receive a non-negotiable statement with full accounting of all deductions on the stub. This breakout of deductions will still be handed to the employee at the District on payday. Those participating in the direct deposit system will find their total take home pay credited to their checking or savings account at the same time, or sooner (i.e., those paydays falling on a holiday), as those electing to continue physically depositing their warrants. Earnings are normally posted the evening of the date shown on the warrant so that immediate withdrawal on payday at the participating bank should be possible. It is not a recommended practice to begin drawing against the account without first consulting the participating bank or your paycheck for deposit verification. Such a precaution could avoid a potential overdraft.

The direct deposit service is programmed to generate a trial run for a direct deposit set-up as well as for every change submitted. Consequently, those enrolling for direct deposit service, as well as those requiring a change to their initial enrollment, will experience the trial run—that is, the paycheck will be a normal one except for the stub containing the direct deposit information (i.e., bank and account code). This precaution allows the employee to edit all transactions before the actual deposit is made on the following payroll. If a discrepancy exists, Payroll should be contacted immediately, preferably before the cut-off of the following payroll.

The direct deposit service is not programmed to service an enrollment assigning earnings to an account other than the employee (and joint member) named on the deposit slip.

As the credit union system is programmed to accept one (1) payroll deduction, those electing direct deposit to a credit union cannot have voluntary deductions (i.e., loan payments) made to the same credit union. It will be necessary to make
arrangements with the credit union to apply earnings internally to the desired accounts at the time of deposit. This internal transfer flexibility may vary among credit unions. Please contact the appropriate participating credit union for details concerning their direct deposit policy on internal transfers.

The requirements necessary for direct deposit participation are outlined below:

1. Complete and sign a Direct Deposit Authorization Form obtained from Payroll.

2. For a checking account deposit, attach to the authorization form a deposit slip verifying the information provided on the authorization.

   For a savings account deposit, attach to the authorization form a savings identification number request provided and authorized by an appropriate bank teller. (Those whose banks provide their customers with a savings identification card can simply attach a copy of their card to the authorization form.) Omission will prevent the processing of the authorization.

3. Submit to Payroll by the cut-off of the applicable payday.

4. Terminating participation requires the completion of another Direct Deposit Authorization Form providing the same information as the initial enrollment; however, a deposit slip is not necessary.

5. To protect your pay, direct deposit actions will not be accomplished based on telephone calls.

6. 9-Month, 9½ Month, 10-Month Contract Employees:

   Once direct deposit service is started by less-than-twelve-month employees, it will continue without interruption (except as noted in the next paragraph) unless payroll is notified by another Direct Deposit form to stop or change accounts.

   When the balance of contract payroll is run, many less-than-twelve-month employees will have more than one paycheck produced. Only the first check can be direct deposited. Less-than-twelve-month employees are cautioned to inspect paychecks received on the last day of their contracts to determine any that may be negotiable.

   The first payroll of the next school year will be a direct deposit as it existed at the end of the previous school year.

7. Terminating 12-Month Contracted Employees Year-End:

   County will end the fiscal year direct depositing only the main check of terminating 12-month employees receiving multiple paychecks due to a
balloon payment of sick leave and/or vacation pay—the balance of checks being negotiable for manual depositing.

8. Continuing 12-Month Contracted Employees:

Direct deposit service will remain ongoing for continuing 12-month contracted employees with no interruption during the transition of fiscal years; reenrollment is not required.

9. All Direct Deposit Participants:

Direct deposit service will end on the final payroll (if not sooner) of an employee terminating employment before the end of his/her contract.

The following is a current list of all financial institutions covered by the direct deposit plan. This list of participating financial institutions is subject to change.

**BANKS**

Arizona Bank
Continental Bank
First Interstate Bank
Great Western Bank
First American National Bank
Thunderbird Bank
United Bank of Arizona
Valley National Bank
American Bank of Commerce
Century Bank
Mission Bank

Bank of Scottsdale
Citizens Union Bank
Bank of Paradise Valley
Farmers and Merchants Bank
Community Bank of Arizona
Grand Canyon State Bank
Rio Salado Bank
First Central Bank
Central Arizona Bank
Sun National Bank

**SAVINGS AND LOAN ASSOCIATIONS**

First Federal Savings & Loan of Phoenix
Home Federal Savings & Loan Assoc.
Pima Savings & Loan Assoc.
Western Savings & Loan Assoc.

Southwest Savings & Loan Assoc.
Security Savings & Loan Assoc.
Sun State Savings & Loan
Universal Savings & Loan

**CREDIT UNIONS**

Arizona Central Credit Union
Arizona State Employees Credit Union
Arizona TELCO Federal Credit Union
Desert Schools Federal Credit Union
First United State Credit Union
Western Horizons Federal Credit Union
Phoenix Honeywell Emp. Fed. Credit Union
San Tan Credit Union

Arizona Federal Credit Union
Tempe Schools Credit Union
Motorola Credit Union of Arizona
Salt River Project Credit Union
Safeway Arizona Fed. Credit Union
Associated Credit Union of Arizona
Grand Canyon Credit Union
APPENDIX H

(FOR INFORMATION ONLY)

ESTABLISHING A CHANGE OF NAME

Changing one's name affects the employee’s payroll file, certification record (if certification is required) and social security earnings.

Before a name change is submitted to the District, the steps listed below must be followed:

1. Contact the nearest Social Security Office for a name change application. (Form SS-5)
   a. The social security law requires original or certified documents be furnished showing both old and new names. In some cases, evidence of age and U.S. citizenship are required. Uncertified or notarized photocopies cannot be accepted.
   b. In approximately 4-6 weeks the new social security card should be received.

2. Those employees whose contracts require certification should, in the meantime, contact the State Department of Education for a name change to their certification. Register the name change with the Maricopa County School Office, 111 South 3rd Avenue, Certification Department.

3. Only upon completion of the above and receipt of the new social security card (or an appropriate authorization from the Social Security Office) should the name change be submitted to the Employee Relations Division office or appropriate unit secretary.
   a. Complete Personnel Information Change form.
   c. Finally, the certified employee should be willing to sign with the District an affirmation stating his/her responsibility has been met by completing an Affirmation of Name Change to Certification Records.
APPENDIX I
OATH OF OFFICE

Every school employee shall take and subscribe to the oath prescribed for public officers pursuant to A.R.S. 38-281. The person taking the oath shall file a copy of the acknowledged oath in the School District office. The School District office shall keep such copy on file as long as the employee remains employed by such School District and for a period of five years after termination of employment with such School District.

The Governing Board shall, at the time of authorizing payment of compensation to any school employee, certify to the County School Superintendent that the employee has complied with the provisions of this section.

It is unlawful for an officer, board, or person charged with the employment, dismissal, or suspension of teachers, instructors, professors, or administrative officers in any school to permit a person to serve as teacher, instructor, professor, or administrative officer in a school without having first complied with this section.
APPENDIX J
COLLECTIVE RIGHTS

Organization Meetings/Activities

Meetings/activities of employee organizations shall generally be held outside normal working hours.

Representative Organizations

The representative group for each employee category shall remain the same from year to year unless a group of employees wishes to challenge the current representation. In the event of a challenge, the procedures outlined below shall be followed. The process must be completed by February 1.

- The employees wishing to challenge the current representative group shall make that declaration to the current representative group and to the assistant superintendent for employee relations by the end of the first week of September.

- The challenging group shall garner at least thirty (30%) percent of the signatures of the employee group that wishes to make a challenge. These signatures shall be on petitions that state that these members of the employee group want the challenging group to represent them.

- The petitions shall be presented to the assistant superintendent for employee relations.

- The assistant superintendent for employee relations shall notify the current representative group and the American Arbitration Association within five (5) working days after receipt of the petitions that an election is to be held.

- The American Arbitration Association shall then conduct an election to determine if employees within the group wish to be represented by the current representative group or by the challenging group.

- The cost of the election shall be borne by the challenging group.

- The winner of the election shall then be the representative group.

Definition of Staff

The membership categories of each representative group will remain the same from year to year. In the event that an employee group does
not fall under a specific category, or if a new position (job title) is declared, the representative group category shall be determined for meet-and-confer purposes through the following procedure:

- The assistant superintendent for employee relations shall inform the individual(s) involved of the need to be represented by one of the representative groups for meet-and-confer purposes.

- The assistant superintendent for employee relations shall also inform the representative groups of the existence of the uncategorized position(s).

- If only one employee is involved in the process, he shall determine which group he wishes to be represented by and shall make application to that representative group.

- If two or more employees are involved, a meeting shall be called by the assistant superintendent for employee relations. At that time the employees shall determine which representative group they wish to represent them and shall make a group application to that representative group.

- The president of the chosen representative group shall determine if the application is acceptable.

- If the application is accepted, the president shall notify the individual(s) involved as well as the assistant superintendent for employee relations within ten (10) working days after receipt of the application. The applicant(s) shall then be represented by that representative group.

- If the application is not accepted, the president shall notify the individual(s) involved as well as the assistant superintendent for employee relations within ten (10) working days after receipt of the application. The president shall then notify the presidents of the other two representative groups, and a decision shall be made among the three presidents within twenty (20) working days after receipt of the application. The president of the appropriate representative group shall notify the individual(s) involved as well as the assistant superintendent for employee relations within five (5) working days after the decision of the presidents.

- The applicant(s) shall then be represented by that representative group.

Within the first month of each school year, the employee relations division will publish the list of all positions by categorical groupings. This list shall be forwarded to the presidents of the representative groups within a week after publication.
Meeting and Conferring

The Governing Board desires to meet and confer with recognized employee groups in decisions affecting those employees before the Governing Board makes any final decision on personnel-related policies, regulations, and procedures. The administration is therefore authorized to establish and maintain procedures and lines of communication to meet and confer annually with employees on such issues.

The Superintendent shall have the responsibility of reporting to the Governing Board all tentative agreements reached by meet-and-confer deliberations, including salaries, benefits, and other conditions of employment.

If agreement cannot be reached, the president/designee(s) of the representative group and member(s) of the administrative team will present their respective proposals to the Governing Board in a study session for informational purposes.

The Governing Board authorizes the administration and the representatives of the representative groups to develop procedures that will define the terms used in the personnel policies, regulations, and procedures.

The professional agreements, including policies, regulations, and procedures, shall be printed at the expense of the District, and a copy shall be given to each District employee.

The professional agreements will be available within 105 days after the close of the meet-and-confer process.

Each employee may be required to sign a statement that he has received a copy of the professional agreement.

In the event that the Governing Board or the representative group indicates a need for revision of an existing personnel-related policy or regulation, the Governing Board President/designee (or representative group president/designee) will contact the representative group president/designee (or Governing Board President/designee) regarding such request.

Within five (5) workings days after the initial request, both parties will enter into the meet-and-confer process to develop the revised policy or regulation for recommendation to the Governing Board. Throughout this process, the representative group will present information and suggestions relevant to the proposed revisions of personnel-related policies, regulations, or procedures. In the event of an emergency determined by either party, the Governing Board President/designee may waive the five-day time line.
Any deletions, additions, or revisions to the present personnel policies, regulations, or procedures that take place through the meet-and-confer process during the year shall be transmitted to the staff by the Superintendent before the effective date of the change.

Employee handbooks are subject in all respects to the laws of the United States and the state of Arizona with respect to the powers, rights, duties, and obligations of the Governing Board, and, in the event that any provision of the handbooks shall at any time be held contrary to law, then such provision shall be of no force and effect, but all other provisions shall be continued in full force and effect. It is understood that the Governing Board may rely on a formal legal opinion issued by the office of the county attorney, and concurred in by the office of the attorney general, as having the force of law.

Employee handbooks are also subject in all respects to the policies of the Governing Board, and in the event that sections of the handbooks are not in agreement with the adopted Governing Board policies as stated in the Governing Board policy manual, the Governing Board policies shall have precedence.

Additions and revisions in the certificated procedures/handbooks that result from the meet-and-confer process and are accepted by the Governing Board shall be accompanied by the appropriate change in Governing Board policy.

Revised: December 1, 1988
# APPENDIX K
PHOENIX UNION HIGH SCHOOL DISTRICT
ADMINISTRATIVE SALARY SCHEDULE
1988-89
CERTIFICATED

<table>
<thead>
<tr>
<th>INCREMENTS</th>
<th>EDUCATION</th>
<th>EXPERIENCE*</th>
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<td></td>
<td>MA+24</td>
<td>5 yr $550</td>
</tr>
<tr>
<td></td>
<td>MA+48</td>
<td>10 yr $600</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15 yr $650</td>
</tr>
</tbody>
</table>

| PRINCIPAL   | 55,194    | 57,517      |
| (12 months) | 59,947    | 62,465      | MA+24 $675 |
|             |           |             | MA+48 $675 |
| DIRECTOR III| 55,194    | 57,517      |
| (12 months) | 59,947    | 62,465      | MA+24 $675 |
|             |           |             | MA+48 $675 |
| DIRECTOR II | 53,618    | 55,927      |
| (12 months) | 58,235    | 60,681      | MA+24 $665 |
|             |           |             | MA+48 $665 |
| DIRECTOR I  | 52,590    | 54,855      |
| (12 months) | 57,119    | 59,518      | MA+24 $655 |
|             |           |             | MA+48 $655 |
| ASST. PRIN. | 46,515    | 48,518      |
| (10 months) | 50,522    | 52,644      | MA+24 $640 |
|             |           |             | MA+48 $640 |
| ED. SUPER. II| 50,456   | 52,629      |
| (12 months) | 54,802    | 57,104      | MA+24 $640 |
|             |           |             | MA+48 $640 |
| ED. SUPER. 1 | 49,990   | 52,141      |
| (12 months) | 54,294    | 56,575      | MA+24 $625 |
|             |           |             | MA+48 $625 |
| ED. COORD.  | 47,722    | 49,778      |
| (12 months) | 51,833    | 54,010      | MA+24 $575 |
|             |           |             | MA+48 $575 |
| ED. SUPER. II| 46,015   | 47,996      |
| (10 months) | 49,978    | 52,077      | MA+24 $640 |
|             |           |             | MA+48 $640 |
| ED. SUPER I | 45,591    | 47,554      |
| (10 months) | 49,517    | 51,597      | MA+24 $625 |
|             |           |             | MA+48 $625 |
| ED. COORD.  | 43,521    | 45,396      |
| (10 months) | 47,270    | 49,255      | MA+24 $575 |
|             |           |             | MA+48 $575 |
|             |           |             | 5 yr $550  |
|             |           |             | 10 yr $600 |
|             |           |             | 15 yr $650 |
|             |           | 5 yr $550   |
|             |           | 10 yr $600  |
|             |           | 15 yr $650  |
## ADMINISTRATIVE SALARY SCHEDULE (cont.)

### CLASSIFIED

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<th>STEP 1</th>
<th>STEP 2</th>
<th>STEP 3</th>
<th>STEP 4</th>
<th>INCREMENTS</th>
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<th>EXPERIENCE*</th>
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* Increment awarded after five years, ten years, and fifteen years of Administrative experience. This includes "acting" administrative experience.
## PHOENIX UNION HIGH SCHOOL DISTRICT

### ADMINISTRATIVE/SUPervisory salary schedule

#### 1989-90

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<th>Position</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
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<td>59,183</td>
<td>61,626</td>
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<tr>
<td>(12 months)</td>
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<td><strong>Director I</strong></td>
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<td>MA+48 $575</td>
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<td>(10 months)</td>
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<td>MA+48 $650</td>
<td>10 yr $600</td>
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<td>(10 months)</td>
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<td>46,667</td>
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<td>15 yr $650</td>
</tr>
</tbody>
</table>

Beginning with the 1990-91 fiscal year, those on step 4 will, in addition to any increment actor, have a step index of 1.04 applied.
## ADMINISTRATIVE/SUPERVISORY SALARY SCHEDULE (cont.)

### CLASSIFIED

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<th>Step</th>
<th>Controller (12 months)</th>
<th>Division Mgr. (12 months)</th>
<th>Coordinator III (12 months)</th>
<th>Coordinator II (12 months)</th>
<th>Coordinator I (12 months)</th>
<th>Super. III (12 months)</th>
<th>Super. II (12 months)</th>
<th>Super. I (12 months)</th>
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**Increments**

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<td>$400</td>
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<td>$400</td>
</tr>
</tbody>
</table>

*Increment awarded after five years, ten years, and fifteen years of Administrative/Supervisory experience. This includes "acting" administrative experience.
Superintendent of Schools
Phoenix Union High School System
2526 West Osborn Road
Phoenix, AZ 85017

PREVIOUS AGREEMENT EXPIRED
JUNE 30, 1989

Respondent:

We have in our file of collective bargaining agreements a copy of your agreement(s):

Phoenix Ariz Union High Sch Dist Classified Ees

WITH SINGLE INDEPENDENT ASSOCIATIONS
ARIZONA

Would you please send us a copy of your current agreement—with any supplements (e.g., employee-benefit plans) and wage schedules—negotiated to replace or to supplement the expired agreement. If your old agreement has been continued without change or if it is to remain in force until negotiations are concluded, a notation to this effect on this letter will be appreciated.

I should like to remind you that our agreement file is open for your use, except for material submitted with a restriction or public inspection. You may return this form and your agreement in the enclosed envelope which requires no postage.

Sincerely yours,

JANET L. NORWOOD
Commissioner

PLEASERETURNTHESLETERWITHTHYOURRESPONSEORAGREEMENT(S).

If more than one agreement, use back of form for each document. (Please Print)

1. Approximate number of employees involved 2,000

2. Number and location of establishments covered by agreement 8 high schools, 1 vocational school, 3 alternative schools

3. Product, service, or type of business High School District, Grades 9-12

4. If your agreement has been extended, indicate new expiration date 6-30-90 (3 new agreements enclosed)

Thomas N. Suddarth, Acting Asst. Supt. for Employee Relations (602) 271-3118
Your Name and Position
4502 North Central, Phoenix, AZ 85012
Address

BLS 2452 (Rev. August 1984)