



THE SCHOOL DISTRICT OF
PALM BEACH COUNTY, FL

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Action By:
May 08, 2024

TO: Principals and Directors
FROM: Timothy Kubrick / Chief of Human Resources
SUBJECT: **FY25 UNIT ADJUSTMENT TRANSFER (UAT)/EXCESS PROCESS**

As a result of the FY25 budget allocations, school centers, and departments may need to implement the Unit Adjustment Transfer (UAT) or Excess Process for affected personnel. The following guidelines detail the steps in identifying UAT or Excess personnel, as well as actions to be taken within the UAT period.

UAT/Excess Process

1. Principals/Directors review their budget allocations for FY25 with Regional Superintendent/Division Head.
2. If staffing adjustments are necessary, Principals/Directors are encouraged to work with their designated HR Partners to identify excess employees.
3. Principals/Directors notify their budget analyst of the position numbers that will be frozen.
4. Principals/Directors work individually with UAT/Excess employees to issue the UAT/Excess Confirmation Letter and guide them through this transition period. [Excess Confirmation Letters](#) can be accessed from the HR Time Task Calendar.
5. Principals/Directors encourage and support UAT/Excess employee(s) to secure a transfer up until the hiring hold begins on Wednesday, May 8 at 5:00 PM.
6. All employee transfers of UAT/Excess personnel will begin on Tuesday, May 14.
7. Affected UAT/Excess employees will be notified of their transfer via email.

Temporary Hiring Hold

Effective Wednesday, May 8 at 5:00 PM, a hiring hold for all instructional positions will be in effect in order to facilitate UAT/Excess placements. The instructional hiring hold will be lifted as soon as possible, but no later than Friday, May 17. Any subject areas not impacted by UAT placements will be lifted from the hiring hold no later than Friday, May 10. All administrative and non-instructional positions are exempt from the hiring hold with the exception of the following positions:

- Media Clerk, Secretary/Attendance Clerk, ITSA, STST

Seniority Queries

- Instructional: PB_HR_SENIORITY_RPT_INSTR
- Administrative: PB_HR_SENIORITY_RPT_ADMIN
- Non-Instructional: PB_HR_SENIORITY_RPT_NONINS

I. Instructional Personnel Guidelines

UAT Criteria for Instructional Personnel

Any teacher notified that he/she is a UAT employee will be immediately eligible for a voluntary transfer, regardless of the employee's years of service in the District or contract status.

Protected Subject Areas

The Budget Department allows schools to retain up to three over-allocation teachers in the "Protected Subject Areas". Schools identified as Priority Support (see attachment) will be allowed to retain all of their teachers regardless of the subject area. Count day will take place in August. Adjustments will be made in September.

Teachers retained in the Protected Subject Areas are not to be identified as excess and are not to be added to the PB UAT/Excess screens. Please notify your designated HR Partner of any over-allocated teachers.

Protected Subject Areas	Elementary Education PreK-6	Reading Grades 6-12	ESE (ALL) Grades PreK-12
Social Science Grades 6-12	Science All Areas/Grades 6-12	English Grades 6-12	Math Grades 6-12

Steps to Identify Instructional UAT Employees

1. Review your FY25 proposed budget and identify any adjustments to instructional positions.
2. Principals are to exhaust all options to retain existing staff prior to identifying an employee as a UAT.

3. When budget adjustments result in the need to excess a teacher, identify the least senior teacher by **Union Seniority Date** with the **Certification Area** that has been reduced.
4. Schools, whose budget adjustments result in the **reduction of one (1) to three (3) instructional employees** for FY25, are to excess employees **only** when the reduction is in a subject area other than the Protected Subject Areas.
5. Instructional staff reductions in positions other than the Protected Subject Areas are to be excessed.
6. After identifying UAT teachers, **encourage and assist** the teachers to apply for positions while the Voluntary Transfer Period remains open.
7. Notify UAT teachers as **soon as possible** using the UAT/Excess Confirmation Letter. Upon being identified as a UAT, the teacher is eligible for voluntary transfer. The deadline to notify an employee that he/she is a UAT is Wednesday, May 8.
8. Any UAT teacher, who has not already secured his/her own position by Wednesday, May 8, must be input to the PB UAT/Excess screens in PeopleSoft no later than Wednesday, May 8.
9. Submit Job Action Requests to move all existing staff into appropriate FY25 positions if applicable.

Examples for Identifying Excess Instructional Staff

FY24	FY25	Positions Reduced	UAT Identified
50 Instructional Units	46 Instructional Units	1.0 Physical Education 1.0 Tch Elementary 2 1.0 Tch ESE VE 1.0 Tch Elementary 5	1.0 Tch Physical Education <i>All others are Protected Subject Areas.</i>
50 Instructional Units	48 Instructional Units	1.0 Tch ESE VE 1.0 Tch Mid Science 5-9	None <i>Both are Protected Subject Areas</i>
50 Instructional Units	46 Instructional Units	1.0 Tch Elementary 1 1.0 Tch Elementary 2 1.0 Tch Elementary 3 1.0 Tch Elementary 4	1.0 Teacher (least senior) <i>Three other teachers would be retained from Protected Subject Areas.</i>

Instructional Employees NOT to be identified as UAT/Excess

If budget adjustments result in the need to excess an employee who is only certified in the following subject areas, contact your designated HR Partner prior to taking any action.

- Adult Education
- Economics 6-12
- Business Education
- French K-12
- Chinese K-12
- Health K-12
- Computer Science K-12
- Sociology 6-12
- Culinary Arts
- Parent Liaison K-12
- Dance K-12
- Psychology 6-12
- Drama K-12
- ROTC
- Drivers Education

Trade-offs that result in the need to excess an employee must be approved by the Regional Superintendent, prior to identifying the impacted employee as UAT/Excess. Placement of the affected employee must be made by the regional office.

Instructional UAT/Excess Contractual Rights and Reference Points

Employees with properly documented performance problems from the present year, employees who are on a Performance Plan, or who did not receive an evaluation rating on his/her most recent annual evaluation of “Effective” or “Highly Effective”, **will not be considered a UAT.**

UAT/Excess Volunteer

An employee with more seniority who received a rating of “Effective” or “Highly Effective” on his/her most recent evaluation may volunteer to be transferred, thus eliminating the need to transfer a less senior employee.

Volunteer UAT/Excess employees must sign and submit the Palm Beach Excess Employees Form:

- Input the employee to the PB UAT/Excess screens as “Volunteer”.
- Input the less-senior employee who is being retained.
- Run the query **PB_HR_RR_UAT_SURPLUS_SIG_Form**.
- Print, sign, and email the form to Maryse Glaze by Wednesday, May 8.

PBSD 1788 - Instructional Placement Preference (IPP) – Due Monday, May 13.

Only Professional Service Contract (PSC), Continuing Contract (CC), or Annual Contract (AC) teachers with three or more years of seniority may submit this form to choose placement preferences from posted school-based vacancies. AC teachers with less than three years of seniority are not eligible to use this form.

Hiring and Scheduling Guidelines of Over-Allocated Employees in the Protected Subject Areas and High Needs Schools

Schools with up to three over-allocated teachers in the “Protected Subject Areas and Priority Support Schools” are required to retain teachers until summer resignations, retirements, terminations, or transfers create a vacancy. Schools must move existing teachers into budgeted positions as they become available prior to hiring additional staff into the subject areas held by affected teachers. **FY25 schedules must be built based on budgeted positions for FY25.** Teachers retained within the Protected Subject Areas are to be scheduled by seniority only after a budgeted FY25 position in the employee’s area of certification becomes available. Until then, any affected teacher is to remain assigned to their current position and serve in the capacity of a resource teacher. Final budget adjustments will be made early September, following Count day, to ensure personnel and allocations match. The same guidelines apply for Priority Support Schools.

II. Administrative School-Based Personnel (Assistant Principals) Guidelines

- **Prior to identifying any administrators as UAT/excess, contact Maryse Glaze.**

District practice has identified excess school-based administrators as those who are least senior at the school site in the AP position. An exception to this process is if an AP with more seniority volunteers to transfer.

Extenuating circumstances include: 1) performance, 2) the needs of the school, and 3) diversity. These circumstances must be discussed and approved by the Regional/Instructional Superintendent and the Deputy Superintendent collectively. If approval is granted, the Regional/Instructional Superintendent will notify the Principal.

Administrative employees who are identified as excess are notified using the **Administrative Excess Confirmation Letter**. All administrative excess employees must be input via PeopleSoft by Wednesday, May 8 . These individuals will work closely with Maryse Glaze, Human Resources Partner, Department of Recruitment & Retention, to locate a suitable placement.

III. Non-School-Based Administrators Guidelines

Non-school-based administrators are appointed annually, and no legal cause shall be required of the School Board in the event the employee is not re-appointed. If the non-school-based administrator’s position is grant-funded, the District has no continued employment obligation should the funding from the grant expire.

Non-school-based administrators who do not hold a valid teaching certificate cannot become “excess” employees. Should their positions be eliminated by budget reductions, they must be non-reappointed. Although these individuals are free to apply to positions for which they are qualified, they have no guaranteed employment with the District for the subsequent school year.

Non-school-based administrators, who do hold a valid teaching certificate may be non-reappointed, reappointed to their current position, or reappointed to an instructional position. If a non-school-based administrator is re-appointed to an instructional position, he/she is encouraged to secure his/her own teaching position, or he/she will be placed in an available instructional position for which he/she is certified.

- If a non-school-based administrator is non-reappointed, employment within the District ends on June 30.
- If a non-school-based administrator is re-appointed to an instructional position, he/she will be assigned to a position by the Department of Recruitment & Retention. Employees who decline the placement are requested to resign.

IV. Non-Instructional Personnel Guidelines

Probationary Contract - Non-Instructional Employees

Non-Instructional employees who are currently within their **probationary** period **may not** be identified as Excess. Instead, the probationary contract must be terminated effective the final duty day of the current school year. For exceptions, principals/directors are encouraged to contact their designated HR Partners.

Schools/Departments Procedures

Schools/Departments are requested to encourage and assist excess non-instructional employees in securing a new job within the District. Affected employees will have until Wednesday, May 8, to locate a suitable position. After that date, the Department of Recruitment & Retention will facilitate appropriate transfers.

Non-Instructional Excess Guidelines

- Non-instructional employees are identified as excess within the school/department by job code.
- Once grouped by job code (i.e., Custodian, Assistant Behavioral/Physical Needs, Administrative Assistant, etc.), **employees will be identified as excess based on his/her Company Seniority Date.**
- Paraprofessionals who have received specialized training (i.e., ESE, Pre-K) may remain only if the more senior paraprofessional within the same job code declines to be trained or volunteers to be excessed.
- Non-instructional employees who are identified as an excess employee must be notified by using the **Non-Instructional Excess Confirmation Letter** no later than Wednesday, May 8.

Non-Bargaining Unit (NBU)/Miscellaneous Employees Guidelines

NBU/Miscellaneous employees may not be identified as UAT/Excess. Should positions be eliminated by budget reductions, NBU/Miscellaneous employees must be non-reappointed. Affected employees may apply to positions for which they are qualified and secure a transfer prior to their last duty day. See below for a list of NBU/Miscellaneous employees who are not to be identified as UAT/Excess.

- **Miscellaneous** (BIA, Afterschool Directors & Assistant Directors, Activity Leaders, Community Resource Person, Social Services Facilitators, Analysts, Children Services Facilitators, Job Trainers, etc.)

V. Procedures to Input UAT/Excess Employees Instructional/Non-Instructional/Administrative

Schools/departments must input their UAT/excess personnel into PeopleSoft no later than Wednesday, May 8.

Process to input UAT/Excess Personnel on PeopleSoft:

1. Click on **PeopleSoft**.
2. Click on **Human Capital Management** located in the PeopleSoft Portal.
3. Click on **Workforce Administration**.
4. Click on **Job Information**.
5. Click on **PB UAT/Excess**.
6. The **PB UAT/Excess** page comes up.
7. **First time only:** click on **Add a New Value**
8. The **PB UAT/Excess** screen appears.
 1. Click on the **magnifying glass** at the end of **PB UAT/Excess period** field.
 2. Select **FY25** and then enter your **School/Department number** in the department field.
 3. Click **Add**.
 4. **PB UAT/Excess** Employees screen comes up.
9. Enter the **Employee ID** number of the UAT/excess employee or click on the **magnifying glass** at the end of the **Empl ID** field to search a list of all your employees.
 1. If you use the **magnifying glass**, click on the **Empl ID** of the current employee.
10. Select **excess reason** by using the **drop-down arrow** in the UAT/Excess **Reason** field.
 - If **Seniority** is selected, no Exception Reason is required (*most common reason*).
 - If **Exception** is selected, you must select the exception reason by clicking on the **magnifying glass** at the end of the **Exception Reason** field and then click on the **correct** reason. Then enter the retained **Employee's ID** number or click on the **magnifying glass** at the end of the Retained **Employee ID** field to search a list of all employees, and click on the **Empl ID** number of the correct employee.
 - If **Voluntary** is selected, enter the retained **Employee's ID** number or click on the **magnifying glass** at the end of the Retained **Employee ID** field to search a list of all employees, and click on the **Empl ID** number of the correct employee. Retained employee's name will appear.
 - If **Administrative to Instructional** is selected, no Exception Reason is required.

11. Select the **+** sign to continue adding additional UAT/excess employees.
12. Select **Save** may be clicked at any time to save information.
13. To remove an employee from the PB UAT/Excess screen, contact your designated HR Partner.

To input interim employees to the UAT/Excess screens, contact your HR Partner.

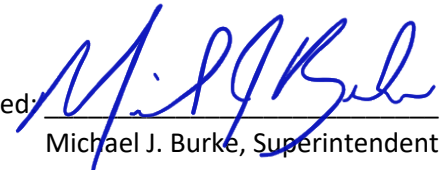
Principals and Department Heads are to provide the following directions to UAT teachers with three or more years of seniority in the District.

Instructions to Submit Instructional Placement Preference (IPP) Form

1. Review Job Postings in PeopleSoft.
2. Select your top four choices from the job postings online (*within your area of certification*).
3. Note the **School, Job Title, and Job Opening ID**. You will need this information to complete the IPP Form.
4. **Complete and electronically submit the IPP form** as close to or no later than **Monday, May 13**.
5. Go to <https://www2.palmbeachschools.org/formssearch/>
6. Enter **1788** in the field for form number and click search.
7. Log into **eForms** with your District username and password.
8. Enter your **Employee ID** number and click the tab. Additional employee information will automatically be filled in on the form. **Verify your address and phone number, and manually change if necessary.**
 1. A valid job posting must be chosen.
 2. Invalid or incomplete choices will not be considered for placement.
9. After completing the form, click on the **Signature box** at the bottom of the form.
10. Click on **Go**.
11. This form will now be electronically submitted to Maryse Glaze, Human Resources Partner, Department of Recruitment & Retention.

Note: The form is to be submitted no later than Monday, May 13. The Department of Recruitment & Retention will work with schools/departments to ensure the most accurate list of job postings is available to UAT teachers.

Attachments

Approved: 
Michael J. Burke, Superintendent



HR Priority Support Schools List FY24

Elementary Schools (30)

Barton Elementary
Belle Glade Elementary
Benoist Farms Elementary
Belvedere Elementary
Dr. Mary M. Bethune Elementary
Glade View Elementary
Gove Elementary
Grove Park Elementary
Highland Elementary
Hope Centennial Elementary
Indian Pines Elementary
KEC/Canal Point Elementary
Liberty Park Elementary
Lincoln Elementary
Northmore Elementary
Orchard View Elementary
Pahokee Elementary
Pine Grove Elementary
Pioneer Park Elementary
Pleasant City Elementary
Rolling Green Elementary
Roosevelt Elementary
Rosenwald Elementary
Seminole Trails Elementary
Starlight Cove
UB Kinsey/Palmview Elementary
Washington Elementary
West Gate Elementary
West Riviera Elementary
Westward Elementary



HR Priority Support Schools List FY24

Middle Schools (12)

Bear Lakes Middle
Carver Middle
Congress Middle
HL Watkins Middle
Jeaga Middle
John F. Kennedy Middle
Lake Shore Middle
Lake Worth Middle
LC Swain Middle
Lantana Middle
Palm Springs Middle
Tradewinds Middle School

High Schools (10)

Boynton Beach High
Glades Central High
Lake Worth High
Pahokee Middle/Senior High
Palm Beach Gardens High
Palm Beach Lakes High
Turning Points Academy
Forest Hill High School
Riviera Beach Prep
South Area Intensive Transition

ESE Campuses (2)

Indian Ridge School
Royal Palm School