The missing link in the personnel paradigm

Carolyn S. Livingston

Follow this and additional works at: https://scholarworks.lib.csusb.edu/etd-project

Part of the Educational Administration and Supervision Commons

Recommended Citation
https://scholarworks.lib.csusb.edu/etd-project/366

This Project is brought to you for free and open access by the John M. Pfau Library at CSUSB ScholarWorks. It has been accepted for inclusion in Theses Digitization Project by an authorized administrator of CSUSB ScholarWorks. For more information, please contact scholarworks@csusb.edu.
California State University
San Bernardino

THE MISSING LINK
IN THE
PERSONNEL PARADIGM

A Project Submitted to
The Faculty of the School of Education
In Partial Fulfillment of the Requirements of the
Degree of
Master of Arts
in
Education: School Administration Option

By
Carolyn S. Livingston, M.A.
San Bernardino, California
1988
APPROVED BY:

Advisor: Dr. Thomas Woods

Second Reader: Dr. Kathleen Cohn
This Master's Project is based on the research and development of an Application Paper Screening Device that can be used by the San Bernardino City Unified School District to more efficiently screen all certificated applications. Research inquiries were responded to by ten districts on this topic. This project includes research findings, review of the literature and bibliography.
ACKNOWLEDGMENTS

I would like to thank the following people for their support and help in completing this project: Dr. Daniel King, Director of Personnel for the San Bernardino City Unified School District; Dr. Thomas Woods, my advisor and mentor; Dr. Kathleen Cohn, my second reader; Geri Slaght M.A., my editor; Dr. Don McWilliams, my editor and computer expert; and my husband Jim for his continued encouragement, love and support.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABSTRACT</td>
<td>iii</td>
</tr>
<tr>
<td>ACKNOWLEDGMENTS</td>
<td>iv</td>
</tr>
<tr>
<td>CHAPTERS</td>
<td></td>
</tr>
<tr>
<td>I. INTRODUCTION</td>
<td>1</td>
</tr>
<tr>
<td>II. METHOD</td>
<td>11</td>
</tr>
<tr>
<td>III. RESULTS</td>
<td>25</td>
</tr>
<tr>
<td>IV. DISCUSSION</td>
<td>27</td>
</tr>
<tr>
<td>APPENDIX A</td>
<td>29</td>
</tr>
<tr>
<td>APPENDIX B</td>
<td>31</td>
</tr>
<tr>
<td>APPENDIX C</td>
<td>34</td>
</tr>
<tr>
<td>APPENDIX D</td>
<td>55</td>
</tr>
<tr>
<td>APPENDIX E</td>
<td>66</td>
</tr>
<tr>
<td>BIBLIOGRAPHY</td>
<td>68</td>
</tr>
</tbody>
</table>
Introduction

The San Bernardino City Unified School District receives approximately twenty-five hundred applications yearly for an average of two-hundred to two-hundred and fifty positions. Personnel manpower limitations are such that only about half of the applicants can be interviewed. The personnel office lacks a technique which enables the office staff to screen the number of applications down to a more manageable number and yet, identify those of the highest caliber.

In preparation for this project I met with Dr. Daniel King, the Director of Personnel for San Bernardino City Unified School District, to discuss the development of the screening device. Dr. King told me that he had recently completed a handbook for the district office that delineates the processes for hiring new teachers for the district, but the handbook lacks an application paper screening device. The district needs this device to more efficiently screen incoming applications. After discussing with him all of the aspects of the application process and interviewing his secretary, I was ready to begin my research.

The device that I propose in this manuscript will be scientific, reliable and consistent, equitable and fair to all concerned. The professional literature is extremely
scarce and personnel directors rely heavily on other personnel practitioners to achieve this goal. The best sources of information are from districts of comparable size that have experienced this problem.

Part of my research for this project entailed contacting districts throughout California. I restricted my search to California because of credentialing policies. Thirty school districts were contacted either by letter (Appendix A) or by phone. I received eleven responses which included techniques and processes for screening applications used by the responding districts. The most useful and applicable data for paper screening techniques came from Los Angeles City Unified School District and Yucaipa Unified School District.

The majority of other districts that responded did not have any significant screening techniques. However those districts that use a device had a single sheet used as an application screening form. This general application screening form covered such areas as; minimum qualifications review, review of "preferred" and/or "highly desirable" qualifications, and recommendations by screening personnel.

Minimum qualification on these screening forms address; application is complete, has proper credential, can acquire proper credential, valid California Drivers
License, meets education (degree) requirements, meets special training requirements and meets experience requirements. "Preferred" and/or "Highly desirable" qualifications are indicated by checking the appropriate box. Recommendations are whether or not the applicant is accepted or rejected for an interview. A special section is provided for additional comments. All of this screening process is done with Affirmative Action goals being considered.

In preparation for the project and to gain as much information as possible on the subject of screening applications, I instigated a comprehensive ERIC and ABI/INFORM search. This search enabled me to locate nine journal articles that dealt in some manner with screening applications. Three graduate level textbooks were also searched for chapters that dealt with personnel screening.

The importance of this research is based on the fact that district offices are overwhelmed with paperwork. With staffing many times being such that there is more paperwork than personnel able to process it, a system must be developed to assist in selecting the most qualified employees. Because this topic is relatively new and uncharted and few techniques have been developed, this field is open for research.
A general theme occurring in several different articles is that screening the applications and resumes before interviewing is a tremendous time saver. Herring (1986) states that "much time and effort can be saved by carefully screening candidates before they are interviewed" (p. 50).

Acuff (1982) cites that "Resumes can be screened rapidly by comparing the applicant's education, skill, experience, and salary range to the requirements listed on the personnel requisition form" (p. 408). The important factor is that employers must have outlined the criteria that they want their future employees to meet. If the personnel employees know specifically what qualities they are looking for, the screening process will be easier.

The Corporate Recruiter (1985) gives an outline on collecting data that includes using "biographical data from the individual's past" (p. 73) to predict the future behavior of the applicant. The author believes that all "application forms, resumes, written employment inquiries, interviews, test results, physical examinations and employment reference checks should be viewed strictly as a means for data collection" (p. 73). The article continues by saying that no one tool should be used because a more comprehensive picture of the applicant is given by using all information available. Also requiring attention are
the following: "omissions or breaks in employment; salary progression; frequency of position changes; reason for leaving previous positions; academic records; outside or non-work activities; reason for wanting a new position; physical condition or general health; neatness; accuracy; and unrequested or inappropriate information given by the applicant" (p.73).

Schorr (1983) believes that "you control the selection process" (p.23) when a company requests resumes. The author also states that "when you read between the lines, resumes and applications contain a wealth of information" (p.23). This allows the employer to analyze exactly what the applicant has to offer the employer. By scrutinizing the data collected one can ascertain such things as job history, patterns of behavior, recommendations and personal goals.

Ewens (1976) cites "In the initial screening of job vitas, look for candidates who give specific evidence of teaching expertise or training" (p.3). He also suggests that applicants present "any course syllabi, teaching exercises, research relating to teaching" (p.4) that would demonstrate their quality of teaching.

A second theme that appears in some of the articles is that of the telephone interview. The telephone interview is to be conducted as a preliminary interview and
expands the data collected in screening the applicant. Sans (1985) cites "the telephone interview can be a tremendous time-saver, but only if you know what you are truly looking for and have prepared a list of specific questions. If you are satisfied with the individual's answers, and feel that there is some 'chemistry' a great test of their motivation is to ask them to prepare a profile" (p.135). He also states that "a couple of discreet phone calls" (p.137) can tell the employer if this is a good candidate. I think that the telephone screening is a technique that should be considered by employers as it can give added information that may not appear on the application. Possibly this technique can be used after the initial screening of the applications because the qualified applicants that remain after initial screening can then be further screened by telephone.

Clifford (1975) lists six qualities that should be taken into consideration regarding the applicant. They are quoted from page fourteen as follows:

1. The personal and social characteristics of the applicant
2. The ability and accomplishments of the applicant
3. The competence in the chosen teaching areas
4. The appearance of the applicant
5. The curricula and ex-curricula training of the applicant

6. The physical fitness and training of the applicant

Also cited in his article as items to consider are; general intelligence, good verbal facility and evidence of moral and personal prerequisites (Clifford, 1975, p. 14).

The personnel director must be careful in using items four and six in the previously mentioned list because of the Civil Rights Act of 1964 which makes illegal discrimination of any kind. If, however, there is a direct relationship between these two characteristics and the job position, the personnel director must address them.

Another source that I used for information on the screening of applicants was the graduate level textbooks used in the preparation of future administrators. One text, by Morphet, Johns, and Reller (1982) states that the district must know the requirements of the position. The district must also try to match the employee and the position. On page three hundred-fifty nine of this text the authors pose the following questions:

1. What are the requirements of each position to be filled?
2. What are the main specifications needed to fill the positions?
3. To what extent does the individual candidate match position expectancies?

4. What is the most feasible and desirable plan for obtaining personnel for the system's short- and long-run needs?

This matching system is crucial to the selection of the most qualified employees. The answers to these questions will facilitate the screening process of the applicants.

Morphet et al. (1982) continue with their concept of matching by stating, "Selection tools and their application are designed to predict on the basis of past performance and present potential, the extent to which a candidate will perform effectively in terms of the types of objectives established for the position" (p. 360).

In the textbook School Personnel Systems by Fawcett (1979), a chapter is dedicated to applicant screening. Chapter Four entitled, "Fine Screening: The Selection Process," deals specifically with the careful selection of qualified personnel. One point that Fawcett makes is that the telephone check can be an advantage for the personnel director. Using the telephone check can save time and, as Fawcett states, can be "less expensive, than mail or personal visitation" (p. 56). The author points out that in order to conduct a successful telephone check, questions must be well prepared and properly planned.
Fawcett (1979) also delineates several questions that should be posed to all applicants whether they be classified, teaching, or administrative. The questions are as follows:

1. Dates of employment.
2. Position at entry and at end of the employment period.
3. Salary at entry and at the end of employment.
4. Quality of the services rendered.
5. Regularity of attendance at work.
6. Relations with fellow employees.
7. Accidents, if any.
8. Reason for leaving, if known.

For teaching positions, additional questions may be:

1. Kinds of students who fared well under instruction.
2. Kinds of students who fared worse under instruction.
3. Relations with parent and community.
4. Relations with students.
5. Relations with nonschool educational agencies.
6. Relations with other members of the profession.

The questions on the application itself should seek this information. If the application can not provide all of the
information then this is where a telephone check could help fill in the blanks. I would recommend the telephone check after the initial receipt and screening of the application. If the application itself is not complete or clear I would not pursue the application any further. This incompleteness I would take as a clue to the qualities of the applicant. In regard to Fawcett's general questions that should be posed to all applicants, items number four and nine should be given heavy priority. These two items; quality of services rendered and employer's attitude towards reemployment can be regarded as a strong, relevant commentary on the applicant. If the applicant's work history was satisfactory or better and the employer would rehire the applicant; the inquiring district should consider the applicant.
Method

I indicated earlier in this paper that I contacted thirty school districts either by mail or phone. As a result of my contacting other districts I received eleven responses that indicated methods of screening applications being used. Los Angeles City Unified School District and Yucaipa Unified School District have the most comprehensive applicant screening processes. The following districts were contacted for information (Figure 1). Responses were received from the following:

Colton Joint Unified School District
Hacienda La Puente Unified School District
Jurupa Unified School District
Long Beach Unified School District
Los Angeles Unified School District
Rialto Unified School District
Riverside County School District
Riverside Unified School District
San Jose Unified School District
Yucaipa Unified School District

The ten responding districts use a variety of application screening processes (Figure 2).
<table>
<thead>
<tr>
<th>District</th>
<th>Letter</th>
<th>Phone</th>
<th>Response</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colton Joint Unified School</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Compton Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fremont Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresno Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garden Grove Unified School</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hacienda La Puente Unified</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Jurupa Unified School District</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Long Beach Unified School</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Los Angeles Unified School</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Montebello Unified School</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moreno Valley Unified School</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mt. Diablo Unified School</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oakland Unified School District</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office of San Diego County</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orange Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pajaro Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poway Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rialto Unified School District</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Richmond Unified School District</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Figure 1)
## District Contact/Response Log

(Figure 1) con't

<table>
<thead>
<tr>
<th>Letter</th>
<th>Phone</th>
<th>Response</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riverside County School District</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Riverside Unified School District</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Sacramento City Unified School District</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Santa Ana Unified School District</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>San Bernardino City Unified School District</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>San Diego County School District</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>San Francisco Unified School District</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>San Jose Unified School District</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>San Juan Unified School District</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>San Mateo Unified School District</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Stockton City Unified School District</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Yucaipa Unified School District</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
### Screening Processes and Devices

#### Frequency Distribution

<table>
<thead>
<tr>
<th>Step Description</th>
<th>Number of Districts that use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Applications are processed to assure completeness of a file.</td>
<td>7</td>
</tr>
<tr>
<td>2. Upon completion - file is referred to an administrator who determines the next step, a) request additional references b) send regret letter c) schedule for an interview (full time or substitute)</td>
<td>1</td>
</tr>
<tr>
<td>3. Intake Counselors</td>
<td>1</td>
</tr>
<tr>
<td>4. Certificated Application Screening Form</td>
<td>3</td>
</tr>
<tr>
<td>5. Interview all applicants</td>
<td>1</td>
</tr>
<tr>
<td>6. Rate applicants</td>
<td>2</td>
</tr>
<tr>
<td>7. Only accept applications for posted positions</td>
<td>1</td>
</tr>
<tr>
<td>8. References checked</td>
<td>1</td>
</tr>
<tr>
<td>9. Job interviews and applications are considered based on two criteria a) required b) desirable</td>
<td>1</td>
</tr>
<tr>
<td>10. Test applicants</td>
<td>1</td>
</tr>
</tbody>
</table>

(Figure 2)
The Hacienda La Puente Unified School District uses the following process:

- Application is date stamped, logged and placed in individual manila folder.
- Application is routed to credential technician who checks credential status and indicates if does/does not qualify for position. Copy of document or verification must accompany application.
- Director of personnel reviews application. If no placement file or references, applicant is not considered until one or the other have arrived.
- Application must be complete by the closing date of job posting in order to be considered.
- Non-qualifying applicants are notified and filed in inactive file. They are kept for one year, then trashed.
- They only accept applications for advertised positions. This does cut down on the paper mill fodder. They generally need substitute teachers, so they recruit in that area all year.

(Appendix B)

This district hired approximately one hundred people for the 1987-1988 school year including temporary and substitute teachers. The personnel office did not know the number of applications received last year.
The strength of this district's process is that they only receive applications for advertised positions. This alone reduces the paper load. However by not accepting applications all the time it appears they would be unable to maintain an application pool.

The San Jose Unified School District responded with a twenty page packet that includes all aspects from recruitment to hiring practices. William Johnston, the Director of Elementary Certificated Personnel, wrote a brief introductory letter that explains the district's general selection process. Some of the items he mentions are as follows:

- They try to see each of the student teachers that train in their district and interview those recommended by the site principal.
- They solicit each local applicant to work as a substitute which allows them to actually see the person's ability to adapt.
- They offer free training to all substitutes.
- The district keeps all applications for at least one year.
- The applications from out of state that do not state why they are coming to the San Jose area are not considered real applications, only information seekers.
Out of almost two thousand applications last year, they feel only about five hundred were actually ready to work in San Jose. (Appendix C)

Mr. Johnston included in his packet a flow chart outlining Elementary Application Processing/Selection Procedures. (Appendix C) The initial procedures seem to follow a general pattern used by other districts. For example; application numbered upon receipt, card mailed to inform candidate of receipt, candidate's placement papers requested and file established. The significant factor that surfaced with the San Jose district is the practice of holding screening interviews. This screening interview is conducted by an appropriate team of principals and/or supervisors. The team then rates the applicant, notes special strengths and makes a general recommendation. The personnel director never sees an application until the applicant has made it through this process.

If a personnel director has access to adequate manpower the screening interview would adequately eliminate unqualified personnel. It appears that the director would only need access to five or six qualified personnel who could rotate and form a screening interview panel.

The three following districts use the same certificated screening form. Jurupa Unified School District, Colton Joint Unified School District, and
Riverside County School District. (Appendix D) This application screening form looks for the following items; credentials, education requirements, and experience requirements. The reviewer can then specify whether the candidate is preferred or not preferred. Recommendation for interview is based on the preferred/not preferred designation received.

The Personnel Director for Jurupa, Mr. Campbell, stated that he reads all applications himself. He also said that in his district the demand is greater than the supply.

The Colton Joint Unified School District uses another form in addition to the application screening form. (Appendix D) This form is the Final Applicant flow information sheet. On this form the authorized personnel indicate the following:

- Division/Department
- Screening Panel Members
- Interview Panel Members
- Reminders
- Applicant Flow

Of particular importance on this form is the documenting for Affirmative Action. This assures the district that there is no discrimination occurring.
This author interviewed Dr. DeSantis, the Director of Personnel for the Rialto Unified School District, by phone. Dr. DeSantis interviews all applications using a team or multiple interviewers. He states that he is ninety-five percent sure of his system and has been using it for six years. A rating scale of one to ten is used during the interview. There are three types of standardized questions that are asked. They regard; discipline, development of lessons and grading. Each applicant is also asked to write a two paragraph essay. This essay is graded holistically and consequently screens out five percent of the applicants because of writing problems. Every candidate must score from seven to ten on a holistic scale of zero to ten. If the candidate scores less than a seven, a rejection letter is sent and he is dropped from the system. A log is also maintained which indicates ethnicity in accordance with Affirmative Action.

After all of the interviews are completed the applicants are ranked according to rating; all tens in the first group, nines in the second group and eights in the third group. The applicants from the ten group are interviewed and selected from first. When that supply is exhausted selections come from the nines and then the eights. This screening process eliminates sixty-nine percent of the applicants.
The Rialto Unified School District receives at least fourteen hundred applications annually and hired one hundred and thirty-five K-12 teachers for the 1987-1988 school year. Applications are kept for one year.

Doris Takenouchi, Director of Elementary Personnel of the Long Beach Unified School District was interviewed by phone. Mrs. Takenouchi and her staff go through all applications by hand. The applications must be complete in order to be processed. They receive up to three thousand applications annually and hired approximately two hundred and fifty people for the 1987-1988 school year. Mrs. Takenouchi wants to see applications to assess the applicants. She rarely does telephone interviews as a screening basis, and considers all applications on an individual basis. (Appendix D)

The Riverside Unified School District utilizes a simple method which is very informal. When applications are received they are logged and entered into the computer listing the preference of the applicant. After the application is logged, it is either sent to Mrs. Vashe K-6 or Mr. Gardner 7-12. Mrs. Vashe and Mr. Gardner review the applications for the following: credential information, years of experience, and areas of need (Special Education or Bilingual Education). After review of the application
they respond to the applicant with a personal letter. At this point they begin the interview process.

The Yucaipa Unified School District has a very sophisticated process for paper screening of applications. I interviewed Judy Bryld, the Personnel Director, by phone and gained a considerable amount of information. Mrs. Bryld also sent me a four page packet that outlines the process used.

Mrs. Bryld stated that; two or more personnel do the paper screening, and job interviews and applications are considered based on two criteria, those required by the job description and those desirable traits for a particular position. Required criteria come from the job description and are such things as certificates and credentials. Desirable criteria are more eclectic. The personnel involved can brainstorm on that and it does depend on the vacancy. Also to be considered as desirable are; training, effective teaching strategies, competency and grade level experience. (Appendix D)

The actual system used breaks down to each member of the screening panel being given a group of applications. The members will then separate the applications into groups; highly qualified, qualified or unqualified. Each member of the team will then rotate the applications after each reading so that eventually all members will have
read and rated the applications. Those applications deemed unqualified by three people will be removed. This process continues until all that remain are two categories; highly qualified applicants and qualified applicants. At this point the rating becomes very selective and narrows down the remaining to only highly qualified. This takes the screening committee to Step Five of the screening process. Step Five is as follows: "The remaining applicants who have been rated as highly qualified will be divided among the committee members. An evaluation questionnaire will be given to each member showing the criteria across the top of the evaluation grid. Directions for completing the grid will be on the document itself. Each member will then proceed to evaluate each and every applicant on the basis of the above-mentioned criteria. This will be done independently and the results will be analyzed through averaging the independent evaluations in order to determine the top applicants who will be interviewed subsequently by a district screening committee" (Yucaipa Screening Form, 1988).

All of the criteria considered must make provisions for Affirmative Action. The Director must be aware of what is needed in the district (ethnic, sex, race).

The Yucaipa School District has one high school, one middle school, and four elementary schools. Mrs. Bryld
does not know how many applications they receive annually. It could be one hundred or more for an elementary position.

The Los Angeles City Unified School District is the largest school district in California. It is divided into eight regions and has eight regional representatives. Los Angeles City Unified School District receives ten to eleven thousand applications annually. Fifteen hundred new personnel were hired for the 1987-1988 school year.

Momi Narikiyo, the Assistant Director of Personnel was interviewed by phone. She relayed the following procedures to me. The months of May through September are intense months of recruitment and hiring for the district. Field administrators put in one week each for the screening process. The directive for this duty comes from the Superintendent. Teacher representatives are also used in the screening process. These representatives review applications and advise as to what positions are open. The applicants are then fielded out to principals for interviews.

The personnel office has a staff of thirteen certificated employees and this staff does virtually all the paper screening. During the months of July and August, using a supplemental budget, professional district experts are pulled in to be part of a group of thirty who implement the interview process. These thirty are called Intake
Counselors. Their task is that of reviewing applications with the applicant using references, resumes, and school progress forms.

This special staff has been trained regarding procedure, key items to look for, completeness, G.P.A., school history and work record. These procedures have been used since the summer of 1984 and appear to be successful. The personnel office tries to use the same people each summer so there is no time lost for retraining. In order to process the extremely high numbers of applications the large staff and sophisticated procedures are necessary. The techniques are unique and appropriate for a district of this size.
Results

In view of the information gained from research journals and textbooks on the subject of application screening and in studying other districts' procedures, it is apparent that good screening procedures are necessary. The following steps should be considered as a possible technique for screening applications.

1. Is the application complete?
2. Does the applicant have a current and appropriate credential?
3. Professional training.
4. Professional references.
5. Teaching experience.
6. California Basic Educational Skills Test (CBEST).

After an application has been screened it can then be individually rated from one to five; one being the lowest and five being the highest. The application should be rated on the quality and desirability of the content and information. The five rating would reflect that in all areas the applicant is highly desirable and preferred. Four would show that the applicant is desirable in most areas. A rating of three would show an applicant that meets all the minimum qualifications; but, has areas that are questionable. Ratings of two and one would be rejected and sent an appropriate notice.
5 - Highly desirable all areas.
4 - Desirable in most areas.
3 - Borderline/questionable desirability
2 - Reject/undesirable
1 - Reject/undesirable

The applicant with a ranking of five would be considered first and sent for interviews. After all with the ranking of a five were considered and positions still remained, then those rated a four would be considered. This process would continue until all positions are filled.

Applicants that did not make it though the initial screening process would not be considered until the applications were complete. They would be held in an appropriate file until completed. If after a reasonable amount of time, as determined by the Personnel Director, the applications were still not complete they would be rejected and the applicant sent an appropriate rejection letter.
Discussion

After reviewing all data, information and research appropriate to the subject of Application Paper Screening, it is evident that a formal process is necessary to adequately screen large numbers of applications.

Many of the districts that responded use some form of screening for their applications. Most seemed to be appropriate for their district. Each district needs to consider the characteristics unique to that district and proceed accordingly. However, it is important that some form of screening takes place to select the most qualified personnel.

The process I recommend for San Bernardino City Unified School District seems to be appropriate, considering the specific need of this district (Figure 3) and will allow the qualified applicants to be seen almost immediately by the Personnel Director. Those who qualify except for an appropriate credential can be issued a one year non-renewable credential and interviewed next. Those that remain and lack critical components will be filed accordingly until they are completed. If used appropriately this process should be of great help to the Personnel Director. Also the process should cut down on the time spent going through applications. (Appendix E)
San Bernardino City Unified School District

Application Screening Form

Note* Before screening process is initiated, Affirmative Action Goals should be addressed.

Name of Applicant________________________________________

Position________________________________________________

Minimum Qualifications Needed:

1. Is the application complete? Yes___ No___
2. Is application neat and presentable? Yes___ No___
3. Does the applicant have a current and appropriate credential? Yes___ No___
4. Is the credential from a reciprocal state? Yes___ No___
5. Professional Training:
   a) Major Complete, academically eligible? Yes___ No___
   b) Complete Program, student teaching methods courses? Yes___ No___
   c) Eligible for Intern? Yes___ No___
   d) Set of Transcripts? Yes___ No___
6. Professional References? Yes___ No___
   a) Placement File? Yes___ No___
   b) Confidential References? Yes___ No___
   c) Thoroughly Satisfactory/ Satisfactory Yes___ No___
7. Recent Teaching Experience Yes___ No___ (classroom, within last five years)
   a) Thoroughly Satisfactory/ Satisfactory Yes___ No___
8. CBEST? Yes___ No___

Note* If there is an unsatisfactory marking in any area application may be eliminated from further consideration.

Signature________________________________________ Date___________

C. Livingston 1988 ©
(Figure 3)
Appendix A
December 14, 1987

TO WHOM IT MAY CONCERN:

This is a letter of introduction for Carolyn Livingston who is working on special assignment in my office analyzing and developing a means for us to screen the applications and papers of teacher applicants.

The San Bernardino City Unified School District receives approximately 2,500 applications yearly for an average of 200 to 250 positions. Our manpower limitations are such that only about half of the applicants can be interviewed. We lack a technique which will enable us to screen the number of applications down to a more manageable number and yet, identify those of the highest caliber.

Hopefully, the procedure will be scientific, reliable and consistent, equitable and fair to all concerned. The professional literature on topics such as this is extremely slim and we rely heavily on personnel practitioners to achieve this goal. We feel that the best sources of information are from districts of your size who may have experienced this problem to some degree.

Please remit your information, methods, techniques and devices to me at my office, 777 North "F" Street, San Bernardino, CA., or to Carolyn Livingston, 1326 Chrysolite, Mentone, CA., 92359.

Sincerely,

Daniel S. King, Ed.D.
Director, Certificated Personnel Services

DSK/slh
Appendix B
1/28/88

Carolyn:

Application is date stamped, logged and placed in individual manila folder.

Application is routed to credential tech. who checks credential status and indicates if does/does not qualify for position. Copy of document or verification must accompany application.

Director of Personnel reviews application. If no placement file or references, applicant is not considered until one or the other have arrived.

Application must be complete by the closing date of job posting in order to be considered.

Non-qualifying applicants are notified and filed in inactive file. They are kept for one year, then trashed.

Does this make sense? Seems much easier to do it than write out.

Norma Martin
x 4337

PS We only accept applications for advertised positions. This does cut down on the paper mill fodder. We generally need subs, so recruit in that area all year.
<table>
<thead>
<tr>
<th>TE</th>
<th>DATE APPLICATION REC'D</th>
<th>NAME</th>
<th>MALE</th>
<th>ETHNIC CODE A/R/C/D</th>
<th>POSITION DESIRED</th>
<th>APPLIED VACANCY</th>
<th>FOR EL/SEC</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>33</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix C
January 13, 1988

San Bernadino City
Unified School District
Daniel S. King, Director
Certificated Personnel Services
777 North F Street
San Bernadino, CA 92410

Dear Mr. King:

Enclosed is a packet of information that may be helpful to you and give you an idea of how our process works.

We try to see each of the student teachers that train in our district and interview those recommended by the site principal. We try to be realistic. We solicit each local applicant to work as a substitute which allows us to actually see the person's ability to adapt. We offer free training to all our substitutes. The District keeps all applications for at least one year.

Those applications from out of state that do not state why they are coming to our specific district are not considered real applications, only information seekers. Out of almost 2000 applications last year, we feel only about 500 were actually ready to work in San Jose.

I hope that this information is helpful and if I can be of further service, please call me at (408) 998-6092.

Sincerely,

William Johnston, Director
Elementary Certificated Personnel

WJ/yb
TO: Hilda Beck  
Associate Superintendent  
Personnel and Business Offices

FROM: Dick Kecskemeti, Director, Secondary Personnel  
Cecil Mansfield, Director, Elementary Personnel

DATE: March 4, 1985

SUBJECT: Recruitment/Employment of New Teachers for 1985-86

The attached documents contain information regarding our plans to recruit new teachers for the 1985-86 school year. In addition, applicant processing and selection procedures are described.

If you have suggestions or wish to discuss this matter, please advise.

DK/CM/jasg  
Attachments
Goal:

To seek and employ the best available qualified candidates to fill vacant teaching positions in the District.

Identification of Vacant Positions for 1985-86:

1. By January 15th, survey persons on leave of absences regarding their intent to return.

2. By February 7th, complete preliminary enrollment projections to determine staff needs.

3. By March 1st, survey school staffs to identify known or probable retirements, resignations and requests for leave of absence.

4. By April 1st, determine District's preliminary plans for addition or deletion of programs. (Staff requirements for Magnet Schools, desegregation effort, etc. must be identified.)

Recruitment Activities:

1. On February 26th, speak to 60 San Jose State teacher trainees about employment prospects in San Jose Unified School District.

2. By March 8th, ask building principals to observe student teachers assigned to their schools and make recommendations to the Personnel Office regarding student teacher's potential.

3. By March 15th, send advertisement poster and brochures to selected training institutions inviting candidates to apply.

4. By March 15th, establish on campus interview dates with training institutions where appropriate.

5. By March 22nd, begin in-District screening interviews of applicants.

6. April 1 - May 31st, make recruitment trips to California training institutions if necessary and appropriate.

Training Institutions/Possible Recruitment Trips:

Local (1 day trips):  
San Jose State University  
Santa Clara University  
Stanford University  
University of California, Berkeley  
University of California, Santa Cruz  
Notre Dame University  
California State University, Hayward
Central Valley:  
- California State University, Fresno  
- University of the Pacific  
- California State University, Sacramento  
- California State University, Chico  
- University of California, Davis  

North Bay:  
- University of California, San Francisco  
- Dominican College  
- California State University, Sonoma  
- California State University, Humboldt  

Southern California:  
- California State University, San Diego  
- University of California, San Diego  
- University of California, Irvine  
- California State University, Fullerton  
- California State University, Dominguez Hills  
- California State University, Long Beach  
- University of California, Riverside  
- University of Southern California  

**Elementary Interview Teams:**

<table>
<thead>
<tr>
<th>Regular Education</th>
<th>Team A</th>
<th>Team B</th>
<th>Team C</th>
<th>Team LH</th>
<th>Team CH</th>
<th>Team SH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gerry Weltzin</td>
<td>Mary Maxwell</td>
<td>Al Moreno</td>
<td>Jerry Kristal</td>
<td>Robert Dalton</td>
<td>Bruce Bondelie</td>
</tr>
<tr>
<td></td>
<td>Rosemary Young</td>
<td>Tom Nanamura</td>
<td>Carol McElroy</td>
<td>Claribel Conway</td>
<td>Marilyn Speed</td>
<td>Helen Rubin</td>
</tr>
</tbody>
</table>

**Secondary Interview Teams:**

TBD

**NOTE:** Interview teams will be scheduled one afternoon (approximately three hours) per week to interview applicants at the District Office and may be sent to interview at local training institutions.
APPLICATION RECEIVED IN PERSONNEL

INTERVIEW CONDUCTED BY APPROPRIATE TEAM OF PRIN./SUPV.

FILE REVIEWED BY PERSONNEL DIRECTOR

DECISION ON CANDIDATE MADE BY PERSONNEL DIRECTOR

ACCEPTABLE

--APPLICATION NUMBERED UPON RECEIPT --CARD MAILED TO INFORM CANDIDATE OF RECEIPT
--CANDIDATES PLACEMENT PAPERS REQUESTED --FILE ESTABLISHED --APPOINTMENT FOR SCREENING INTERVIEW MADE

--TEAM COMPLETES RATING FORM --SPECIAL STRENGTHS NOTED --GENERAL RECOMMENDATION MADE

--PLACEMENT PAPERS READ --REFERENCES CHECKED --INTERVIEW RATINGS EXAMINED

NOT ACCEPTABLE

REJECTION LETTER SENT

--LETTER SENT TO CANDIDATE --FILE PLACED IN POOL

POOL

SCHOOL VACANCY IDENTIFIED

--PRINCIPAL: REVIEWS FILES IN POOL, --SELECTS CANDIDATES FOR INTERVIEWING, --FORMULATES JOB RELATED QUESTIONS, --CONTACTS CANDIDATES TO SCHEDULE INTERVIEW

PRINCIPAL CONDUCTS INTERVIEWS

--PRINCIPAL: RANKS CANDIDATES, --MAKES SELECTION, --FORWARDS WRITTEN RECOMMENDATION TO PERS. --Sends LETTERS TO UNSUCCESSFUL CANDIDATES

CANDIDATE SELECTED TO FILL VACANCY

--PERSONNEL DIRECTOR HOLDS EMPLOYMENT CONF.

NEW EMPLOYEE PROCESSING BEGINS
SECONDARY EMPLOYMENT PROCEDURES

LOCAL APPLICANTS

1. APPLICANT SUBmits APPLICATION
   PAPERS AND REFERENCES REQUESTED (LETTER L-1)
   PAPERS AND REFERENCES RECEIVED
   APPOINTMENT MADE FOR INTERVIEW WITH APPROPRIATE INTERVIEW TEAM (LETTER L-2)
   INTERVIEW COMPLETED
   CANDIDATE IS NOT ACCEPTABLE
   APPLICANT IS NOTIFIED THAT HE/SHE IS NOT BEING CONSIDERED FOR A TEACHING POSITION. HIS/HER ACTIVE FILE IS IN THE PERSONNEL OFFICE AND AS VACANCIES OCCUR, HE/SHE WILL BE INTERVIEWED BY THE APPROPRIATE SCHOOL ADMINISTRATOR (LETTER L-4)
   HOLD FILE
   PRINCIPAL INDICATES CHOICE TO PERSONNEL; PERSONNEL OFFERS TEACHING POSITION.

2. CANDIDATE IS ACCEPTABLE
   CANDIDATE IS NOTIFIED THAT HE/SHE IS CURRENTLY BEING CONSIDERED FOR A TEACHING POSITION. HIS/HER ACTIVE FILE IS IN THE PERSONNEL OFFICE AND AS VACANCIES OCCUR, HE/SHE WILL BE INTERVIEWED BY THE APPROPRIATE SCHOOL ADMINISTRATOR (LETTER L-4)
   VACANCY OCCURS - APPLICANT'S FILE IS SENT. PRINCIPAL MAKES APPOINTMENT WITH APPLICANT. APPLICANT IS INTERVIEWED
   FORMAL EMPLOYMENT PROCEDURE IS ACTIVATED (FORM H-1)

APPLICANT IS NOT HIRED. FILE IS RETURNED TO PERSONNEL (LETTER L-5)

Files are updated December of each year with postcard update #1.

HIRE-L
1-85
DIVISION OF PERSONNEL
SECONDARY EMPLOYMENT PROCEDURES
OUT-OF-STATE APPLICANTS

REQUEST FOR EMPLOYMENT INFORMATION
OR FOR APPLICATION IS RECEIVED

APPLICATION AND INFORMATION IS
FORWARDED TO APPLICANT (LETTER #OS-1)

COMPLETED APPLICATION IS RECEIVED

PAPERS AND REFERENCES ARE REQUESTED (LETTER L-1)

PAPERS AND REFERENCES ARE RECEIVED

CANDIDATE APPEARS TO BE DESIRABLE.
INTERVIEW IS SUGGESTED:
- LOCALLY AT CHRISTMAS, EASTER, AND
  SUMMER VACATION PERIODS
- ON RECRUITMENT TRIP
  (LETTER #OS-2)

INTERVIEW COMPLETED

CANDIDATE APPEARS TO BE UNACCEPTABLE
"NO" LETTER SENT
(LETTER #OS-3)

CANDIDATE IS NOTIFIED THAT HE/SHE IS
CURRENTLY BEING CONSIDERED FOR A
TEACHING POSITION. HIS/HER ACTIVE FILE
IS IN THE PERSONNEL OFFICE
AND AS VACANCIES OCCUR, HE/SHE WILL BE
CONSIDERED FOR THE POSITION.
(LETTER #OS-4)

HOLD FILE (OUT-OF-STATE)

APPLICANT IS NOT HIRED.
FILE IS RETURNED TO
PERSONNEL OFFICE.

VACANCY OCCURS - APPLICANT'S FILE
IS SENT. PRINCIPAL MAKES SELECTION
EITHER ON PERSONAL INTERVIEW OR
UPON RECOMMENDATION OF TEAM OR
INDIVIDUAL WHO PERFORMED
OUT-OF-STATE OR VACATION INTERVIEW.

PRINCIPAL INDICATES
CHOICE TO PERSONNEL.
PERSONNEL OFFERS
TEACHING POSITION.

FORMAL EMPLOYMENT
PROCEDURE IS ACTIVATED.
(FORM H-1)

Files are updated December of each
year with postcard Update #1.

DIVISION OF PERSONNEL

HIRE - OS
1-85
has applied for a teaching position in the San Jose Unified School District. You have been noted as a source for professional recommendation of this candidate.

I would appreciate receiving pertinent evaluative information from you as soon as possible so that the candidate's application can be processed.

Thank you.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg

L-1
L-85
Your completed application has been received and is now on file in the San Jose Unified School District, Division of Personnel Office.

An appointment for an interview has been made for you on __________, at __________.

Please arrange to be at the Personnel Office, 1605 Park Avenue, San Jose, California, a few minutes before your scheduled appointment.

I appreciate your interest in our District.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg

SAN JOSE UNIFIED SCHOOL DISTRICT
1605 PARK AVENUE, SAN JOSE, CA 95126 (408) 996-6088

PERSONNEL DEPARTMENT

L-2
1-85

AN EQUAL OPPORTUNITY AND AFFIRMATIVE ACTION EMPLOYER
As a result of 1) your personal interview, 2) evaluation of your training and experience, and 3) when possible, contact with personal references, it has been determined that your application will not be considered for a teaching position for the 1985-86 school year.

Thank you for applying for a teaching position in the San Jose Unified School District.

Sincerely,

Dick Kecskemeti  
Director, Secondary Personnel  
Division of Personnel

DK/jasg

L-3  
1-85
As a result of 1) your personal interview, 2) evaluation of your training and experience, and 3) when possible, contact with personal references, your application for a teaching position in the San Jose Unified School District is now accepted and on file.

Vacancies occur throughout the year, and as they materialize in your academic area you will be contacted for a personal interview by the school principal. Your application and file will remain active in my office until employment or through December of 1985.

If you accept a position in another district, please be so kind as to notify me so that I may remove your application from our files.

My best wishes for successful future interviews with San Jose Unified District administrators.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg
Thank you for participating in the recent interviews for (position) at (school). (Principal) has completed his selection procedure and has offered the position to (new teacher).

Please be assured that you are still an active applicant for future vacancies in the San Jose Unified School District and as positions become available, you will be contacted.

Sincerely,

Dick Kecskemeti  
Director, Secondary Personnel  
Division of Personnel

DK/jasg

L-5  
1-85
POST CARD TO BE PRINTED

TO: PERSONNEL OFFICE
SAN JOSE UNIFIED SCHOOL DISTRICT

CHECK:

☐ Please hold my application in your active file and review it as vacancies occur.

☐ I am no longer available for a position.

Name________________________________________
Address_____________________________________
Phone_______________________________________
Update #1

1-85
FORMAL EMPLOYMENT PROCEDURE - SECONDARY PERSONNEL

___ 1) OFFER LETTER (0-1)

___ 2) RESPONSE TO OFFER LETTER RECEIVED

___ 3) PRE-EMPLOYMENT CONFERENCE

   The following forms are complete:

   a) New Employee Worksheet

   b) Payroll Office Notification Authorizing Benefit Eligibility

   c) Certificated New Employee Application Form

   d) Statement of No Conflict of Employment With Another District

   e) Request for Verification of Prior Service Experience/Accumulated Sick Leave Information

   f) First Employment Health Examination Certificate

   g) Child Abuse Reporting Requirement

   i) Tuberculin Card

   j) Graduate Units List

   k) Excerpt from Agreement with SJTA and SJUSD Pertaining to Graduate Units

   l) Current Teachers' Salary Schedule

   m) Current School Year Calendar

   n) SJTA Enrollment Form

   o) SJTA Fees or Dues Form

   p) Agreement Between SJTA and SJUSD

___ 4) Salary Set $_________

___ 5) Salary Card - Significant Data Recorded

___ 6) Rules and Regulations Explained

___ 7) Board Action (Date ____________)

___ 8) Units Verified (Date ____________)

___ 9) Credential Verified (Date ________)

___ 10) CBEST Verified

NAME ___________________________ DATE OF EMPLOYMENT ___________________________ DEPARTMENT OF PERSONNEL
Dear

[Name] has applied for a teaching position in the San Jose Unified School District. You have been noted as a source for professional recommendation of this candidate.

I would appreciate receiving pertinent evaluative information from you as soon as possible so that the candidate’s application can be processed.

Thank you.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Instruction

DK/jasg

L-1
l-85
Dear

Thank you for your interest in a secondary teaching position in the San Jose Unified School District. Enclosed you will find a folder which will provide information about our schools and an application form which should be returned to my office as soon as possible.

Upon receipt of your completed application, I will: 1) Request your placement file from the appropriate college, 2) Contact personal references and after evaluation of these documents, 3) Send you a letter indicating whether or not San Jose Unified School District will consider you for a teaching position.

A regular California teaching credential, dependent upon the desired grade level and passage of a CBEST examination, is required of teachers in our school district. Information pertaining to credentials may be secured from the Credentials Division, State Department of Education, Sacramento, California 95814.

If I can be of further service to you, please contact me.

Sincerely,

Dick Keckemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg
Dear

As a result of the evaluation of your training and experience and, when possible, contact with personal references, your application for a teaching position in the San Jose Unified School District is now accepted.

Although personal interviews are not mandatory for employment, they are suggested. Interviews are held at 1605 Park Avenue throughout the year. A special trip to California with the single purpose of an interview with the San Jose Unified School District, Personnel Office, is discouraged. However, 1) if you have relatives in the area, 2) desire to contact many school districts regarding positions, or 3) are planning a vacation in our area, please contact my office for an appointment. In some instances, out-of-state recruitment is planned and if one of our recruiters is in your area, you will be contacted.

A regular California teaching credential, dependent upon the desired grade level and passage of a CBEST examination is required of teachers in our school district. Information pertaining to credentials may be secured from the Credential Division, State Department of Education, Sacramento, California 95814.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DX/jasg

OS-2
1-85
Dear

As a result of the evaluation of your training and experience, and when possible, contact with personal references, it has been determined that your application will not be considered for a teaching position for the 1985-86 school year.

Thank you for applying in the San Jose Unified School District.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg

OS-3
1-85
Dear

As a result of 1) your personal interview, 2) evaluation of your training and experience, and 3) when possible, contact with personal references, your application for a teaching position in the San Jose Unified School District is now accepted and placed in our active applicant file.

Vacancies occur throughout the year and as they materialize in your academic area you will be considered for the position. Your application and file will remain active in my office until employment or through December, 1985.

If you accept a position in another district, please be so kind as to notify me so that I may remove your application from my files.

My best wishes for successful future consideration by San Jose Unified School District administrators.

Sincerely,

Dick Kecskemeti
Director, Secondary Personnel
Division of Personnel

DK/jasg

OS-4
1-85
FORMAL EMPLOYMENT PROCEDURE - SECONDARY PERSONNEL

NAME ________________________ DATE OF EMPLOYMENT ________

1) OFFER LETTER (0-1)

2) RESPONSE TO OFFER LETTER RECEIVED

3) PRE-EMPLOYMENT CONFERENCE

The following forms are complete:

a) New Employee Worksheet

b) Payroll Office Notification Authorizing Benefit Eligibility

c) Certificated New Employee Application Form

d) Statement of No Conflict of Employment With Another District

e) Request for Verification of Prior Service Experience/Accumulated Sick Leave Information

f) First Employment Health Examination Certificate

g) Child Abuse Reporting Requirement

i) Tuberculin Card

j) Graduate Units List

k) Excerpt from Agreement with SJTA and SJUSD Pertaining to Graduate Units

l) Current Teachers' Salary Schedule

m) Current School Year Calendar

n) SJTA Enrollment Form

o) SJTA Fees or Dues Form

p) Agreement Between SJTA and SJUSD

4) Salary Set $__________

5) Salary Card - Significant Data Recorded

6) Rules and Regulations Explained

7) Board Action (Date ____________)

8) Units Verified (Date ____________)

9) Credential Verified (Date ________)

10) CBEST Verified

DIVISION OF PERSONNEL
Appendix D
NOTE: Attach to application and return to the Personnel Office after screening.

POSITION:

NAME OF APPLICANT:

NOTE: Before the screening/interview process is initiated, Affirmative Action Goals should be reviewed. If there are questions, please contact the Personnel Office.

| MINIMUM QUALIFICATIONS REVIEW: |
| --- | --- | --- | --- | --- | --- |
| Yes | No | N/A | 1. Application is complete. If not, explain below. |
| Yes | No | N/A | 2. Has appropriate credential(s). |
| Yes | No | N/A | 3. Will acquire credential prior to starting date. |
| Yes | No | N/A | 4. Meets education (degree) requirements. |
| Yes | No | N/A | 5. Meets special training requirements, if any. |
| Yes | No | N/A | 6. Meets experience requirements. |
| Yes | No | N/A | 7. OTHER: (specify below) |

Comments:

"PREFERRED" AND/OR "DESIRABLE" QUALIFICATIONS REVIEW:

NOTE: These qualifications may be used as additional paper screening criteria, if applied consistently to all applications. These qualifications may be also used as additional criteria in the determination of the successful candidate after interviewing.

Applicant meets all "preferred" and/or "desirable" qualifications.

Applicant does not meet the following "preferred" and/or "desirable" qualifications:

RECOMMENDATIONS:

Application accepted - schedule for interview

Application rejected because:

Does not meet the minimum and/or desirable qualifications as checked above.

Interview limited to _____ candidates. Candidate did not meet additional established screening criteria as follows (Be specific):

Other:

NOTE: Additional established criteria must be consistently applied to all applications.

SIGNATURE(S): ______________________ DATE: ______________________

1/3/78
NOTE: Attach to application and return to Personnel Department after screening.

POSITION: _______________________________________

NAME OF APPLICANT: _______________________________________

NOTE: Before screening/interview process is initiated, Affirmative Action Goals should be reviewed by Ass't. Supt./Director and Panel members.

MINIMUM QUALIFICATIONS REVIEW:

☐ Yes ☐ No 1. Application is complete (If no, explain below)
☐ Yes ☐ No ☐ N/A 2. Has proper credential
☐ Yes ☐ No ☐ N/A 3. Can acquire proper credential
☐ Yes ☐ No ☐ N/A 4. Valid California Driver's License (if required)
☐ Yes ☐ No ☐ N/A 5. Meets education (degree) requirements
☐ Yes ☐ No ☐ N/A 6. Meets special training requirements, if any
☐ Yes ☐ No ☐ N/A 7. Meets experience requirements
☐ Yes ☐ No 8. OTHER: (Specify below)

COMMENTS: _______________________________________

Review of “preferred” and/or “highly desirable” qualifications:

NOTE: These qualifications may be used as additional paper screening criteria, if applied consistently to all applications. These qualifications may also be used as additional criteria in the determination of the successful candidate after interviewing.

☐ Applicant meets all “preferred” and/or “highly desirable” qualifications.
☐ Applicant does not meet the following “preferred” and/or “highly desirable” qualifications.

RECOMMENDATIONS:

☐ Application accepted - schedule for interview

☐ Application rejected because:

☐ Does not meet the minimum qualifications as checked above.
☐ Interview limited to _____ candidates. Candidate did not meet additional established screening criteria as follows.

(Be specific):

☐ Other:

Note: Additional established criteria must be consistently applied to all applications and not be in conflict with Affirmative Action Program.

SIGNATURE(S) ___________________________ DATE: ___________________________
PERSONNEL DEPARTMENT
FINAL APPLICANT FLOW INFORMATION

Please complete this form and return to Personnel Department after interviews. Include applications of those interviewed and any rating sheets used for interview.

1. POSITION: __________________________________________

2. DIVISION/DEPARTMENT: ______________________________

3. SCREENING PANEL MEMBERS:

   Chairperson: _________________________________________

4. ADDITIONAL ESTABLISHED CRITERIA (OTHER THAN MINIMUM QUALIFICATIONS) FOR SCREENING, IF ANY: ____________________________________________

5. INTERVIEW PANEL MEMBERS:

   Chairperson: _________________________________________

6. REMINDERS:

   A. Was background verification (reference) check completed?

   B. Be prepared to justify why the successful candidate was selected over all others interviewed. Submit rating sheets with applications to Personnel Department.

   C. Please keep a list of the questions asked during the interview.

   D. The successful candidate will be notified by the Personnel Department unless prior arrangements have been made with the Director of Personnel.

7. AUTHORIZATION TO OFFER EMPLOYMENT TO THE FOLLOWING NAMED CANDIDATE:

   __________________________________________

   Authorized Signature  Date: ______________________

PROPOSED STARTING DATE: ____________________________
RIVERSIDE COUNTY OFFICE OF EDUCATION
DIVISION OF PERSONNEL AND EMPLOYEE RELATIONS SERVICES

Application Screening Form

NOTE: Attach to application and return to Personnel after screening.

POSITION: ____________________________

NAME OF APPLICANT: ____________________________

NOTE: Before screening/interview process is initiated, Affirmative Action Goals should be reviewed by Ass't. Supt./Director and Panel members.

MINIMUM QUALIFICATIONS REVIEW:

☐ Yes ☐ No ☐ N/A 1. Application is complete (If no, explain below)
☐ Yes ☐ No ☐ N/A 2. Has proper credential
☐ Yes ☐ No ☐ N/A 3. Can acquire proper credential
☐ Yes ☐ No ☐ N/A 4. Valid California Driver's License (if required)
☐ Yes ☐ No ☐ N/A 5. Meets education (degree) requirements
☐ Yes ☐ No ☐ N/A 6. Meets special training requirements, if any
☐ Yes ☐ No ☐ N/A 7. Meets experience requirements
☐ Yes ☐ No 8. OTHER: (Specify below)

COMMENTS:

Review of "preferred" and/or "highly desirable" qualifications:

NOTE: These qualifications may be used as additional paper screening criteria, if applied consistently to all applications. These qualifications may be also used as additional criteria in the determination of the successful candidate after interviewing.

☐ Applicant meets all "preferred" and/or "highly desirable" qualifications.
☐ Applicant does not meet the following "preferred" and/or "highly desirable qualifications:

RECOMMENDATIONS:

☐ Application accepted - schedule for interview

☐ Application rejected because:
  ☐ Does not meet the minimum qualifications as checked above.
  ☐ Interview limited to —— candidates. Candidate did not meet additional established screening criteria as follows.
    (Be specific): ____________________________

☐ Other: ____________________________

Note: Additional established criteria must be consistently applied to all applications and not be in conflict with Affirmative Action Program

SIGNATURE(S): ____________________________

DATE: ____________________________

Form No. 2018 - 2/75 (Revised 6-82)
February 22, 1988

San Bernardino City Unified School District
777 North F Street
San Bernardino, California 92410

Attention: Dr. Daniel S. King, Director
Certificated Personnel Services

Dear Dr. King:

Please overlook our untimely response. I think you will understand that staffing for second semester has occupied our time.

We understand and share your concern about applications, etc. While we have not yet been able to create a completely manageable system, the following have proved to be workable for us.

1. Applications are processed by two personnel (one elementary, and one secondary) clerks who assure completeness of a file prior to review by an administrator.

2. Upon completion (transcripts, a minimum of three references, evidence of a credential) the file is referred to an administrator (one elementary, and one secondary) who determines the next step (one of the following):
   a. request additional references
   b. send regret letter
   c. schedule for an interview (full time)
   d. schedule for an interview (substitute)

3. Office interviews are conducted daily - during the mornings - generally three to four by each administrator.

4. When the need for additional interviewers is determined, the Director is authorized to request selected district administrators to assist within reason, generally one day per semester. For this purpose, the Certificated Personnel Office has trained selected site administrators (approximately 40), in the procedures and techniques for interviewing and evaluating candidates. In addition, we have trained a number of our lower level administrators (vice-principals, assistant principals, consultants, and administrative assistants) to interview substitute candidates as needed but primarily during the summer months.
5. All senior high principals (also trained interviewers) are asked to provide a minimum of five days of service to the Personnel Office during the summer months when their schools are not in session.

6. During peak periods when applications and documents over load the applicant processing desks, temporary employees are selected to assist with filing, typing, and coding.

We are indebted to a large number of principals and others who are usually eager to assist us when called upon. The usefulness of our "corps" of interviewers is dependent upon the thoroughness of their training. This, I advise, must receive a high priority. All interviewers must be aware that the Personnel Administrators will scrutinize the interviewing process to assure fairness, comparability and similarity of evaluations.

I hope these ideas are helpful to you. I request, too, that if time permits, that you forward me a summary of some of the more effective techniques you learn about as you receive responses.

Sincerely,

Marietta S. Palmer, Director
Certificated Personnel

/kw
Non-Job Related Material - It is extremely important in the screening process to base your evaluation only on job related criterion. Unfortunately, applicants often include on their applications non-job related material. Please ignore this type of information in your screening efforts. The following are examples of non-job related information:

A. Marital status
B. Number of children
C. Age
D. Ethnic Background
E. Physical disabilities
F. Sex

Confidentiality - The papers which you will be evaluating are of a very sensitive and confidential nature. It is of paramount importance that the documents, names of applicants and conversations that are part of today's activities be held in strictest confidence by all the members of the committee.

Criteria - The following criteria are the basis upon which we would wish to select the most qualified candidates avoiding personal attributes inasmuch as they are impossible to measure through a paper screening process.

A. Required:

B. Desired:
Directions: Please check category and initial on the appropriate line.

<table>
<thead>
<tr>
<th>Initials</th>
<th>Highly Qualified</th>
<th>Qualified</th>
<th>Unqualified</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
INDEPENDENT EVALUATION FORM

Rank each candidate in each of the criterion listed according to information available from the papers: 1 - Outstanding; 2 - Highly Qualified; 3 - Slightly more than Qualified; 4 - Qualified; 5 - Unqualified.

<table>
<thead>
<tr>
<th>Criteria 1</th>
<th>Criteria 2</th>
<th>Criteria 3</th>
<th>Criteria 4</th>
<th>Criteria 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Initial Paper Screen

A. **Step I** - Each member will be given a group of applications to evaluate and separate into three groups: highly qualified, qualified, unqualified according to the listed criteria.

B. **Step II** - Each member will pass to the person on his/her right the group which he/she determined to be unqualified candidates. This individual will review these applications and either validate the previous judgment or isolate any which are perceived to be highly qualified or qualified. Again, the unqualified group will be passed to the next person on the right for validation or removal to qualified or highly qualified. At this point, those deemed unqualified by three people will be removed from consideration. **Note:** Each application will have a cover sheet on which each evaluator will note his/her recommendation (highly qualified, qualified, unqualified) and his/her initials.

C. **Step III** - This same process will be followed with the group of qualified applicants. After an application has been judged by three individuals to be qualified or unqualified, these qualified and unqualified applicants will be removed from consideration.

D. **Step IV** - At this point there is a need to reduce the number of highly qualified applicants to . Each group of highly qualified candidates will be carried through the process of validation by passing it to the person to the right to reanalyze and regroup into highly qualified and qualified. The qualified group will then be passed to the next person on the right for validation or regrouping. Again, three (3) consecutive judgments of qualified will be required before the candidate is removed from consideration. This process will continue until there are or less applicants judged to be highly qualified. If the committee has at this point reduced the population to , no future action will be required. If the population is still beyond , it will be necessary to proceed to Step V.

E. **Step V** - The remaining applicants who have been rated as highly qualified will be divided among the committee members. An evaluation questionnaire will also be given to each member showing the criteria across the top of the evaluation grid. Directions for completing the grid will be on the document itself. Each member will then proceed to evaluate each and every applicant on the basis of the above-mentioned criteria. This will be done independently and the results will be analyzed through averaging the independent evaluations in order to determine the top applicants who will be interviewed subsequently by a district screening committee.

Thank you for all your time, expertise, and efforts!
Appendix E
March 22, 1988

To:
Department of Education
California State University
San Bernardino, California

From:
Dr. Daniel King
Director of Personnel
San Bernardino City Unified
School District
San Bernardino, California

As the Personnel Director of San Bernardino City Unified School District I identified a need that existed in regard to processing certificated applications. We annually receive approximately 2,500 applications for the 50-200 vacancies annually in San Bernardino. Considering the manpower limitations in the personnel office, I felt that it was critical to develop a quicker and more efficient method of screening the applications. I have recently completed a handbook to be used by site administrators in the recruitment and selection of certificated personnel. The only element it lacked was an application screening device. Carolyn S. Livingston came to me for an idea for her Master's Project and I shared with her the missing element of the handbook. She then agreed to develop this form. The importance of this project is based on the lack of a screening instrument to best identify the most qualified applicants.

Under my direction and in cooperation with Dr. Thomas Woods of California State University, San Bernardino, Carolyn researched, interviewed personnel and developed this missing element. From the thirty districts in California that were contacted ten responses were received. These ten districts shared their techniques with us. Carolyn identified ten potential elements involving other districts techniques for processing applications and developed an application screening form. This form included critical items that would expedite the screening process. She also charted the frequency distribution of the responding districts devices to demonstrate exactly what types of techniques were being used.

Carolyn has demonstrated that she has thoroughly researched and interviewed the necessary personnel to develop this form for the San Bernardino City Unified School District. This form would be of benefit to any district that receives large numbers of applications.

Sincerely,

Dr. Daniel King
Bibliography


