

# AGREEMENT

School District No. 1

Multnomah County Oregon

and

Portland Association of Teachers

Substitute Teachers

2016 – 2019

Contract Extended 2019 - 2020

## Table of Contents

Article No.	Article	Page
1	Recognition	1
2	Association Rights	1
3	Dues and Payroll Deductions	2
4	Management Rights	4
5	No Strike Clause.	4
6	Discipline Procedure	5
7	Substitute Rights	9
8	Substitute Lists	13
9	Work Hours	16
10	Sick Leave	18
11	Grievance Procedure	19
12	Insurance	24
13	Compensation	26
14	Duration	27
	MOU - Substitute Systems/Assignment	29
	MOU - Bargaining Process	30
	Signature Page	31
	MOU – Contract Extension Agreement	32
	Index	33

ARTICLE 1  
RECOGNITION

A. The Board of Directors of Portland Public Schools recognizes the Portland Association of Teachers as the exclusive bargaining agent for all substitute teachers employed by Portland Public Schools.

B. In this contract the term "District" shall refer to the Board or any of its agents, supervisors or administrators. The term "Association" shall refer to the Portland Association of Teachers and the term "substitute" shall refer to all substitute teachers.

C. Nothing contained in this Agreement or mutually relied on in bargaining will be interpreted and/or applied so as to eliminate or reduce any current management right or established working condition that is a mandatory subject for bargaining. The Board, however, may otherwise reserve the right to unilaterally change its policies relating to all matters which do not involve mandatory subjects of bargaining.

ARTICLE 2  
ASSOCIATION RIGHTS

As it pertains to working conditions, the rights set forth below shall be exclusive to the Association.

A. The Association shall have the right to conduct Association business on school district property, use district facilities and equipment, use district mail services, teachers' mail boxes, and use the PAT bulletin board in each building. These uses will not interrupt classes or other normal school operations. The Association shall pay for the reasonable costs of all materials, supplies and special services required beyond normal operation incidental to such uses.

B. Upon request, the District shall furnish the Association reasonably available information necessary to its function as bargaining agent.

C. At substitute meetings held by the District, the Association shall have the right to make brief presentations/announcements about Association programs or activities. The District will give prior notice of such meetings to the Association and will give consideration to recommendations made by the Association regarding such meetings.

D. Any District appointed committee which considers issues relating to substitutes and includes substitutes shall include at least one member appointed by the Association. Such appointee shall be a substitute teacher.

E. The rights provided to the Association under the PAT Teachers' Contract to speak at Board meetings may be used to address the Association's substitute teachers' concerns.

F. Substitute(s) designated by the Association may conduct Association business so long as it does not interrupt classes or other normal school operations.

G. Issues relating to substitutes may be brought to the contract administration meetings as provided in the PAT Teachers' Contract.

H. The District will consider up to three (3) substitute teachers identified by the Association as being on release time during the times that negotiations occur between the District and the Association. That is, such substitute teachers will receive substitute pay during such period of time. The time spent in negotiations shall count toward the total amount of time required for insurance eligibility. Should negotiations take place at times other than when schools are in session, the District shall not be obligated to pay and such time will not count toward insurance eligibility. The period of time in negotiations shall not be viewed as a break in a multiple day assignment of the involved substitute teacher.

I. The District and the Association shall meet every other month, beginning in October, each school year in a Joint Contract Administration committee. The District shall pay up to three (3) substitute teachers a half-day release time for attending the meetings.

### ARTICLE 3

#### DUES AND PAYROLL DEDUCTIONS

A. A substitute teacher may request, in writing, that his/her regular Association membership dues, including NEAFCAPE, OEA-PIE PAT-TVIP and the OEA Foundation, be deducted from his/her salary. Such authorization shall continue in effect until revoked in writing. Deductions will be made only for the months the substitute teacher actually works.

Withdrawing the authorization for payroll deduction for such dues may be accomplished by writing to the Office of the Association and to the District Payroll Office. Written notifications received prior to October 1 shall be effective October 1 of the same year. Otherwise they shall be effective October of the ensuing year.

B. The District shall deduct an amount(s) established by the Association not to exceed usual and customary dues for substitutes, each pay month from the pay of each substitute who actually works that month and who is not a member of the Association. Such an amount shall represent compensation to the Association for any purpose authorized by law for use of fair share fees.

C. By the 5th working day of each month the District shall provide a check with the sum of all such deductions for the previous month's paycheck along with a list of names of those substitutes from whom deductions have been made.

D. Upon appropriate written request from the substitute, the District shall deduct from the salary of the substitute and make appropriate remittance for the following approved deductions within five (5) working days following the end of the calendar month in which the payroll check has been issued:

- 403(b) Roth and Traditional Options
- Approved Financial Institutions
- District Approved Charitable Organizations
- Flexible Spending Accounts (IRS Section 125)

The District, upon appropriate authorization of the unit member, shall deduct from the salary of the unit member and make proper remittance for any other plans or programs jointly approved by the Association and the Board.

E. The Association covenants and warrants that its present Bylaws provides for and agrees to indemnify, defend and hold the District harmless for the foregoing fair share deductions and dues deductions authorizations and withdrawals procedures. In the event the District invokes this paragraph, then the Association will provide the attorney and the parties will fully cooperate in any litigation. In the event the District wishes to use its own attorney, then the District will pay the cost of said attorney.

F. Each month, the District shall provide the Association a list of all substitutes who are currently on the District's Substitute Teacher list. The list shall include the contact information for each substitute including the "AESOP" email provided by the substitute.

G. Substitute teachers' paycheck stubs shall show the gross pay, any retirement contributions, and an itemization of deductions.

ARTICLE 4  
MANAGEMENT RIGHTS

Subject to the expressed terms of this Agreement, the Board and its designees hereby retain and reserve unto itself all powers, rights, authority, duties and responsibilities conferred upon and vested in it by the laws of the State of Oregon, including the functions and programs of the District, its standards of services and education, its overall budget, utilization of technology and its organizational structure, the selection, direction and assignment of its personnel, the use of its facilities, and all areas of discretion in matters of inherent managerial policy. Nothing in this Agreement shall preclude the District from assigning unassigned regular teachers to work as substitutes.

ARTICLE 5  
NO STRIKE CLAUSE

During the term of this Agreement, the Association, its officers, representatives and members of the bargaining unit shall not engage in or condone any strike, slowdown, work stoppage or other such concerted activities by substitute teachers of the District.

ARTICLE 6  
DISCIPLINE PROCEDURE

**A. Respectful Work Environment**

All comments related to substitute behavior shall be made privately. Materials relating to disciplinary action shall be placed in the personnel file.

No substitute shall be disciplined without just cause.

**B. Personnel File**

1 A substitute shall be provided a copy of any materials relating to his/her work performance if such materials are to be placed in that substitute teacher's personnel file.

2. Materials related to an incident, other than a complaint processed according to E.2 of this Article, must be placed in the file within thirty (30) days of knowledge of the incident by the Human Resources Department. A substitute shall have the right to review the contents of his/her personnel file retained by the District. A representative of the Association may, at the request of the substitute, accompany the substitute in this review or be authorized by the substitute, in writing, to make the review. A substitute may attach a written response to any item in his/her personnel file. A substitute may request and have granted that a Letter of Expectation be removed from his/her file if after three (3) years of being written no subsequent similar entries have been made into the personnel file.

**C. Representation**

If a substitute is required to meet with an administrator regarding a matter that could result in discipline, the substitute shall be given prior written notice of the reasons for such meeting and of the right to have a representative of the Association present.

**D. Classroom Restriction**

A request that a substitute not return to a particular classroom shall be honored if the teacher has made a good faith effort to contact the substitute prior to the request. Notice of such a request, including the reason stated by the classroom teacher, shall be given to the substitute. The substitute shall have the right to request a meeting with such teacher. A classroom restriction shall not be considered discipline.

**E. Complaints**

1 "Complaint" means an allegation made against the substitute teacher brought by a parent, other citizen, a non-supervisory third party or a supervisor. This includes allegations that lead a supervisor to seek a meeting with a substitute, a Letter of Expectation, a written reprimand or a building restriction. Complaints shall not be placed in the personnel file unless they result in a Letter of Expectation or a disciplinary action.

2. A supervisor may choose to meet directly with the substitute to discuss an incident and advise the substitute how to handle similar situations in the future. If an incident is handled in this way, it is not considered discipline.

3. Should the supervisor feel that it is appropriate, based upon a substitute's actions, he or she may write a Letter of Expectation, within fifteen (15) days of the supervisor's receipt of the complaint. The supervisor shall mail the letter to the substitute and send a copy to the Substitute Office. The Letter of Expectation must be based upon factual record and deal with a situation that was in the substitute's control. The purpose of the Letter of Expectation is to document the notice to the employee of a district rule or policy. The Letter of Expectation shall be part of the substitute's personnel file, but shall not be considered discipline. The substitute has the right to write a rebuttal to the Letter of Expectation which shall be attached to the letter and kept in the personnel file.

4. A substitute teacher shall be notified of any complaint which the Human Resources administrator responsible for substitutes considers to be of such a nature that discipline could result. Such complaint must be received by the Human Resources Department within twelve (12) days of the date of the incident or upon first knowledge by the site administrator. "Days" means regular student school days. Notice to the substitute teacher shall be given within fifteen (15) days following receipt of the complaint or report by the Human Resources Department. No complaint received by the Human Resources department more than six months beyond the incident which gave rise to the complaint will



lead to discipline unless the incident is of a nature that termination (level 4) is the required form of discipline.

**5.** A substitute teacher shall have the right to have a representative present at any meeting with an administrator regarding a complaint.

**6.** The supervisor shall describe the specifics of the complaint, including but not limited to, the time, place and type of action complained of, if known, at the meeting. If the complaint is used to support any disciplinary action, the name of the complainant shall be given.

#### **F. Employee Discipline**

**1.** Supervisors and HR are encouraged to seek and impose the lowest appropriate form of response (disciplinary or nondisciplinary).

**2.** A written reprimand is a written form of discipline for actions by a substitute that clearly violate the district's rules or policies and where the substitute knew or should have known would lead to discipline. A written reprimand shall contain the exact rule violated by the substitute and summarize the evidence that supports the accusation. A supervisor must notify human resources within the timelines specified in 6.E.3.

**3.** A building restriction is a form of discipline. A building restriction is a period of time in which a substitute may not work at a particular building. The length of a building restriction shall depend on the circumstances, but shall not be greater than ten school months from the date of original issue.

**4.** A request by a supervisor for disciplinary action shall be honored as long as there was a substantive reason and such reason was within the control and responsibility of the substitute. Prior to such a determination by the Human Resources Department, a meeting of the substitute, an Association representative, if requested, the supervisor or designee, and a Human Resources Department representative will be held.

**5.** If it is determined that discipline is justified, disciplinary action may consist of a written reprimand or a building restriction. The District shall inform the substitute in writing of the result of any disciplinary proceeding, including the consequences of any further instances of discipline, and shall contact the Substitute to make sure the information was received.

**G. Progressive Discipline**

**1.** A first instance of discipline shall place the substitute on "step 1" of a four-step scale. Subsequent instances of discipline will move the substitute progressively to steps 2, 3, and discharge.

**2.** Action by the District may commence at any of the above steps depending on the severity of the incident. When imposing discipline, the District may also choose not to count it as a step up on the scale.

**3.** For purposes of progressive discipline only: A substitute receiving a Step 1 discipline will remain on Step 1 for two years following the issuance of a reprimand or the expiration of a building restriction. If during that period, the substitute receives a second-single level discipline they will be moved to Step 2. If no discipline occurs during the 2-year period they will no longer be on a Step.

A substitute on Step 2 will remain there for 3 years from the issuance of the reprimand or the end of a building restriction. If a substitute on Step 2 receives another single level discipline they will be moved to Step 3. If no discipline occurs during the 3-year period they will no longer be on a Step.

A substitute on Step 3 will remain there unless Human Resources, the substitute and PAT agree to lower the Step to 1,2 or none. If a substitute on Step 3 receives another discipline of any kind they will be discharged from PPS.

ARTICLE 7

SUBSTITUTE RIGHTS

A. Physical Examinations.

Physical examinations of substitutes shall not be required. However, the District may require that the substitute provide medical documentation that s/he is medically and physically able to perform the job duties of a substitute teacher.

B. Nondiscrimination.

In matters of wages, hours and employment relations, or any other matter covered by this Agreement, the District agrees to follow a policy of not discriminating against any substitute on the basis of race, color, national origin, ancestry, sex, age, weight, height, marital status, religion, disability, sexual orientation, lawful off-duty political activity or associations, membership or non-membership in the Association or participation in its activities, the fact that the substitute's residence is outside the District, or as otherwise provided by School Board policy. However, this provision shall not be construed to prevent the following:

1. District participation in programs conducted in an effort to increase opportunities for minority groups, subject to the provisions of this Agreement.
2. Distinctions resulting from a bona fide occupational requirement reasonably necessary to the normal operation of the District, including, but not limited to, distinctions due to the physical requirements of the employment, lack of adequate facilities to accommodate both sexes, or other distinctions authorized by law including retirement requirements.
3. Consequences of District policies pertaining to assignment of spouses both employed by the District if one is an administrative or supervisory employee.

4. It is the intention of the parties that the interpretation given to this Article shall be consistent with the proper interpretation of the provisions of the Oregon Fair Employment Practices law contained in ORS 659.028 and 659.030.

C. Nonreprisal for Grievances.

A reprisal shall not be taken against a substitute in response to that substitute's right to file a grievance as provided in this Agreement.

D. Academic Freedom.

A substitute teacher while assigned as a substitute shall have the same Academic Freedom rights as provided in the PAT Teachers' Contract when the substitute is responsible for lesson plans. Examples include when lesson plans are not provided by the teacher or when students finish the planned lesson early.

E. Student Grades and Discipline.

When the substitute teacher is responsible for grading, and issues student grades in accordance with District policies, a supervisor shall not change them unless a substantive reason exists. This provision shall not be interpreted to allow a substitute to assign grades in any manner which deviates from general district-wide practices. A substitute teacher shall have the same rights in administering student discipline and student health procedures as the teacher for whom they are substituting. The building discipline plan shall be included in the substitute building folder at each site and such plan shall conform with District policies and regulations.

1. An allegation that a student has committed assault or battery upon a unit member shall result in the removal of the student from the responsibility of the unit member pending administrative investigation of the incident. The administrator shall exercise appropriate progressive discipline. If the investigation shows battery did occur and the unit member so recommends, the student will not be returned to the affected member's responsibility.

2. Any student making a serious or menacing threat of harm to the person, property or family members of a substitute teacher shall be immediately subject to appropriate discipline in accordance with the Students' Rights and Responsibilities Handbook.

3. Student behavioral records shall be accessible to the receiving unit member. School officials will set up procedures so that information about students with records of violence including weapon violations will be available, in accordance with the law, to members who "need to know" as a result of an assignment to teach or supervise the student.

4. Any student found to have committed assault or battery upon a unit member shall be immediately subject to appropriate discipline in accordance with the Students' Rights and Responsibilities Handbook. However, there shall be a minimum of five (5) days suspension for a threat (assault) and mandatory expulsion for the remainder of the year for battery. The Superintendent may modify the disciplinary consequences on a case- by-case basis.

F. Personal Injury Benefits and Property Loss.

1. Any case of assault upon a substitute while acting within the scope of his/her duties shall be promptly reported in writing to the building administrator who shall forward a copy to the appropriate Central Office Administrator for investigation and resolution.

2. The District shall reimburse substitutes for loss or destruction of personal property excluding vehicles under the following circumstances:

i. When the loss is a result of any assault on the substitute's person suffered during the course of employment.

ii. When the substitute has exercised reasonable care to protect his/her personal property.

iii. When use of personal property for instructional purposes has been approved in writing by the building administrator and the substitute has exercised reasonable care to protect such property.

Reimbursement shall be at replacement cost (not to exceed actual cost) less any insurance or worker's compensation reimbursement. Reimbursement shall not be made for losses of less than Five Dollars (\$5.00) or that portion in excess of Four Hundred Dollars (\$400.00) and shall not be made when carelessness or negligence on the part of the substitute was evident. The substitute shall cooperate and support the District in its investigation and resolution of any reported loss. The District will provide assistance in attempting to investigate and/or reclaim other stolen or damaged personal property including automobiles.

#### G. Liability Insurance.

The District shall provide, on a fully paid basis, bodily injury, liability and property damage insurance coverage, to the limits carried by the District for the use of automobiles owned, leased or hired by a substitute teacher while in the normal course of his/her duties as an employee of the District. This coverage shall apply only as excess insurance over and above other valid and collectible liability insurance carried by the substitute teacher. The District may require as a condition to this coverage that before the vehicle is used on District business, the substitute teacher provide a license of insurance showing that he or she has at least the minimum amount of insurance required to license a vehicle in the State of Oregon. The District will reimburse the substitute teacher for any deductible cost the substitute teacher is required to pay, as a result of an on-duty accident, not to exceed Two Hundred Fifty Dollars (\$250). Reimbursement will not be made if the substitute teacher is convicted of or admits to driving under the influence of intoxicants or with a suspended license.

#### H. Safety

A substitute shall have the right to refuse to expose himself or herself to immediate danger created by unsafe working conditions when such danger threatens substantial bodily injury or would be a significant health hazard to the substitute. The substitute shall give notice of the condition to his/her supervisor and shall be subject to assignment to another location or duty while the condition is being investigated and/or corrected. The District recognizes the responsibility to make every reasonable effort to enhance the security of building and grounds as may be required through the use of necessary lighting and other safety precautions. The District will post notice when non-routine cleaners, paints, sealant, and other chemicals are to be used at the work site.

#### I. Personal Life of A Substitute

The personal life of a substitute is not an appropriate concern of the District, except as it affects the substitute's fitness for or performance of his/her duties.

J. Keys.

Whenever possible, substitutes shall have access to keys necessary for their assignment in a building and shall be accountable for safeguarding keys in accordance with District regulations.

K. Substitute Teacher Report Form.

The District and the Association shall use a mutually agreed upon electronic Site Report Form for use by substitute teachers to identify those buildings which do not provide building information, up-to-date attendance lists, secure locations for personal belongings, and/or other information or tools necessary to the substitute teaching assignment.

The Substitute Office shall review submitted Site Report Forms and promptly work with the site administrators to insure that substitute teachers are provided with the needed materials and information. The Substitute Office shall provide this information upon request to PAT at regularly scheduled meetings with PAT.

ARTICLE 8  
SUBSTITUTE LISTS

A. The District shall maintain two (2) lists of substitutes as follows:

1. Master Substitute List

This list shall be of those substitutes available for assignment without restriction within their substitute certification. Substitutes on the master list may, however, indicate their preference of assignment. A master list substitute who is eligible for the restricted list may choose to move to the restricted list by providing the restricted-list application to the HR department by the first day of the new school year. In addition, a substitute may move to the restricted list when a change in circumstance occurs such as health or family issues. No substitute may move to the restricted list from master list more than once a year.

## 2. Restricted Substitute List

This list shall be those substitutes who have indicated their desire to limit their assignments to particular subject matters, locations, or times. Substitutes on the restricted list, however, may be called for other assignments when requirements for substitutes cannot be adequately filled with substitutes from the master listing.

Eligibility for the restricted list is open to substitutes with a hire date prior to January 1, 1995, to a substitute who has worked as a substitute for the district for 15 years or more and has retired from PERS, and to PPS retirees and to part-time teachers.

B. Needs for substitutes shall first be filled from the master substitute list. The District may consider the following factors in making such assignments: certification in area requested, knowledge and/or experience in the area requested, equitable distribution of assignments (fairness factor) and seniority as a substitute. An exception will be made when a request for one substitute for a specific assignment is received by the Substitute System using the process described below.

C. The following process shall apply in filling requests for substitutes:

1. Requests will be filled in the order requested. Retentions and continuing assignments take precedence over new requests.
2. Calls for substitutes, except in an emergency, shall generally be made during the week commencing Sunday afternoon through Friday noon.
3. Two (2) requests for substitutes may be made by absent teachers. If, due to an error by the District's Substitute Office, no attempt is made to contact the two substitutes requested, the first substitute requested shall be paid one-half for the amount of the assignment and shall receive credit toward insurance, assuming that each substitute was properly licensed for the assignment, was available, and not equivalently assigned elsewhere.



D. The substitute lists (and monthly updates of those lists) shall be emailed to teachers and substitute teachers in care of their District email addresses.

E. A substitute on the master substitute list who does not work a minimum of twenty (20) days per school year may be removed from the list, providing there was adequate work available during that school year. Of the twenty (20) days at least five (5) days must be worked from the first day of school through January 31st, and at least five (5) days from February 1st through the last day of school. If a substitute does not meet the five (5) day minimum in either half of the year they may be removed from the list. A substitute on the restricted substitute list who does not work a minimum of five (5) days in a school year may be removed from the list, providing there was adequate work available in the District during the school year. However, a substitute on either list may remove himself/herself from further assignment during a period of a lawful work stoppage by regular teachers by notifying the District in writing.

F. When the district creates a summer-list of substitutes, it may establish a reasonable deadline by which substitutes may submit their names for consideration. Only substitute teachers who volunteer their names by the deadline shall be on the summer list.

G. If a substitute has not been interviewed by the Human Resources Department within the last two years, s/he may upon request to Human Resources be granted such an interview to enhance her/his applicant standing.

H. For the purpose of posting within the Substitute System, a substitute with only a Substitute Teaching License who formerly held a regular Oregon TSPC license within five (5) years of becoming a PPS substitute will be listed for daily or short-term assignments as being area- specific licensed under their previous TSPC license. Teachers who hold only a Substitute Teaching License and who have one hundred seventy (170) teaching days in a subject matter as a PPS substitute shall be listed as licensed under that area.

ARTICLE 9  
WORK HOURS

- A. The work day for full-day substitutes shall start fifteen (15) minutes before the student day and end fifteen (15) minutes after the last regular student period, but not less than seven (7) hours.
- B. Substitutes will be called for work at least one-half (1/2) day at a time. Three hours and forty-five minutes (3 hours and 45 minutes) shall constitute one-half (1/2) day.
- C. After working ten (10) consecutive days in the same assignment, the workday and schedule for full-day substitutes shall be the same as that for regular teachers.
- D. If a substitute is called for an assignment in error by the Substitute Office and reports, or if the substitute is not needed after reporting to work, the substitute shall be paid for a half-day but shall be subject to assignment by the building principal or supervisor. If another need for a substitute opens in that building during the day, the substitute may be placed in that assignment, if the substitute declines the assignment they will not be paid.
- E. The general times adhered to shall be outlined in the Portland Public Schools Schedule of School Starting/Ending Times (Substitute Teacher Work Day Schedule). These times shall coincide with the contractual workday for substitute teachers. A non-standard assignment (e.g. a half-day long, midday assignment) shall count as a full-day assignment for purposes of determining insurance eligibility per Article 10.C
- F. The building principal shall ensure that arrangements are made for restroom breaks for unit members in the same manner as such breaks are provided to the teachers for whom they are substituting.
- G. Substitute teaching in regularly scheduled night school (Benson, Grant and Marshall) and year-round school shall be counted as half-day or full-day as outlined in Article 8.A and B for the purpose of calculating benefits eligibility.

H. The parties agree that orientation/professional development for substitute teachers is a desired operational goal. When funds are available, the District will provide a one-half day paid orientation/professional development for substitute teachers. The Contract Administration committee shall coordinate the elements of the program and its implementation.

I. The District may provide trainings to limited numbers of substitutes in the substitute pool to improve those substitutes' abilities to succeed in particular areas or programs. Substitutes shall be paid for such trainings at their hourly rate based on a 7.5- hour day.

The District shall announce opportunities for such trainings, and the criteria by which substitutes shall be selected to participate, to all substitutes and to the PAT, and shall set a reasonable deadline for substitutes to apply. The criteria may include (but are not limited to): master list status; area of licensure; days worked within a stated time period, in the District and/or in the relevant areas or programs. The District may not choose substitutes for such trainings without using such criteria.

The District may incorporate completion of such trainings into the job assignment process, provided it does not interfere with absent teachers' ability to choose their preferred substitutes (by direct assignment and by Favorite Five status).

J. Substitute teachers shall be required to certify that they have completed the state- required Abuse training. If the district requires substitute teachers to take other trainings such as Sexual Harassment/Workplace Discrimination or Emergency Preparedness, the substitute teacher shall complete the trainings and be paid at their hourly rate based on a 7.5-hour day.

Article 10  
Sick Leave

- A.** Effective July 1, 2016, substitutes will accrue paid sick leave at a rate of one (1) day per seventeen and seven tenths (17.7) days paid.
- B.** There is no limit on the amount of sick leave they may accrue.
- C.** All sick leave absences must be taken in half-day or full-day increments.
- D.** A Substitute who has accumulated sick leave during employment in another Oregon school district shall be entitled to transfer any accumulated sick leave from such district upon proper verification, but only if the Substitute agrees to substitute only for Portland Public Schools. The transfer of sick leave accumulated with another Oregon district shall be effective when the professional educator has completed thirty (30) working days in the District. A Substitute may only use up to 75 days of sick leave accumulated in another district.
- E.** Sick leave may only be used for personal illness and medical/dental appointments. Substitutes will not accept a single or half-day assignment which conflicts with an already scheduled medical or dental appointment.
- F.** Sick leave may be used when a Substitute:

  - 1.** Had already accepted an assignment prior to 12:00 AM on the day of the use;
  - 2.** Notifies the Substitute Office via the online [Job Cancellation/Sick Leave Request Form](#) at least 2 hours in advance of the start of the assignment; and
  - 3.** Cancels the assignment in Aesop at least 2 hours in advance of the start of the assignment.

**G.** If a Substitute cancels an assignment within 2 hours of the start of the assignment due to unforeseen circumstances, they may use sick leave if they:

1. Notify the Substitute Office prior to the start time of the assignment with a cancellation request via the online [Job Cancellation/Sick Leave Request Form](#); and

2. Cancel the job in Aesop, or if unable to cancel the job in Aesop, call the Substitute Office.

**H.** The online Job Cancellation/Sick Leave Request Form at <https://goo.gl/forms/RFRaGS0RSsEni5TD3> shall include:

1. Job confirmation number,

2. Date of the assignment,

3. School of assignment, and

4. Amount of sick leave being used (half day or full day).

## ARTICLE 11

### GRIEVANCE PROCEDURE

#### SECTION A - DEFINITIONS, TIMELINES

1. A "grievance" is a complaint that this Agreement has been violated.

2. An "employee grievance" is a complaint by one or more substitutes that the District violated provisions of this Agreement and that such violation directly affected the substitute(s).

3. An "Association grievance" is a complaint by the Association that its rights under this Agreement have been violated or that named substitute(s) rights under this Agreement have been violated.

4. A "party in interest" is the grievant(s) and any person(s) who might be required to take action to resolve the dispute.

5. A "day" is defined as a regular student school day.

6. Grievances must be filed within thirty (30) days after the first knowledge by the grievant of the occurrence constituting the basis of the grievance.

## SECTION B - GENERAL PROCEDURES

1. A substitute who initiates a grievance may elect to be represented by the Association or may elect to represent himself/herself at Levels I and II. A substitute representing himself/herself shall so indicate in writing and shall include a statement that the substitute assumes responsibility for all costs which the substitute may incur associated with processing of the grievance.

2. A substitute is entitled to have an Association representative present at any meeting or hearing held under this procedure.

3. A substitute may file and process a grievance up to the step of arbitration and have said grievance adjusted without the intervention of the Association if:

(a) the adjustment is consistent with the terms of this Agreement, and

(b) the Association office has been notified in advance and given opportunity to be present at all meetings pursuant to the grievance. A copy of any decision shall be forwarded to the Association office.

An individual may not proceed to arbitration without the written consent of the Association.

4. Time extensions shall be consented to in writing and with the mutual consent of the grievant, or the Association on behalf of the grievant, and the District.

5. Failure at any step of this procedure to communicate the decision in writing in a grievance within the specified time limit shall permit the grievance to proceed to the next step. Failure at any step of this procedure to appeal the decision to the next step within the specified time limit shall be deemed to be acceptance of the decision rendered at that step.

6. All parties shall cooperate in the investigation of a grievance and promptly supply any readily available relevant information or documents to the other party.
  
7. Except as otherwise provided by law, this grievance procedure shall constitute the exclusive remedy of substitutes and the Association.
  
8. The written grievance filed at any level shall contain the specific Agreement article, section and paragraph that has allegedly been violated (e.g. Article 6.C.), a short statement of the facts giving rise to the violation and the relief sought. The written response shall include the decision and the rationale for such decision.
  
9. All documents, communications and records dealing with the processing of a grievance shall be filed in a separate grievance file which shall constitute a "personnel file" within the meaning of the confidentiality provisions of ORS 342.850. Access to those files shall be limited to those directly involved in the case.
  
10. Except as otherwise provided by law or by agreement of the parties, meetings and hearings under this procedure shall not be conducted in public.
  
11. Attendance at an arbitration hearing by a substitute shall not be viewed as interrupting continuous service in an assignment exceeding ten (10) days.

## SECTION C - STEPS AND PROCEDURES

A grievance shall be initiated with the administrator whose action or decision is alleged to have violated a provision of this Agreement.

### LEVEL I

#### STEP 1 (Informal Level)

The grievant shall attempt to informally resolve the matter by a discussion with the administrator alleged to have violated a provision of this Agreement.

## STEP 2

If the matter is not resolved at Step 1, the grievant shall file a written statement of the grievance with the administrator. Such filing shall be within seven (7) days of the Step 1 conference.

## STEP3

Within seven (7) days of the receipt of the grievance filed at Step 2, the administrator shall set forth in writing his/her decision.

## LEVEL II (Superintendent or Superintendent's Designee) STEP 1

An appeal of a grievance from Level I shall be filed with the Superintendent or Superintendent's Designee within seven (7) days following receipt of the Level I, Step 3 decision.

## STEP 2

Within ten (10) days of receipt of the appeal, the Superintendent or Superintendent's Designee shall conduct a grievance hearing at a mutually acceptable time. Within seven (7) days following completion of the hearing, a written decision shall be provided to the parties.

## STEP 3

Within seven (7) days following receipt of the Level II, Step 2 decision, the grievant shall notify the Superintendent or Superintendent's Designee as to whether or not the decision is acceptable. If it is not acceptable, the decision shall be submitted to the Superintendent for recommendation to the Board of Education. Board action shall ordinarily take place at the next scheduled Board meeting provided the next scheduled meeting is beyond seven (7) days from the date of the receipt of the notice that the Superintendent or Superintendent's Designee's decision is not acceptable.

## SECTION D - ARBITRATION

If the decision of the Board is not acceptable, the grievance may be pursued through arbitration. The grievant must notify the District within ten (10) days of the receipt of the Board decision of his/her intent to proceed to arbitration. Only the District and the Association, in its behalf or on behalf of a substitute(s), shall be parties to arbitration.



1. Requesting an Arbitrator.

Within seven (7) days of the receipt of a final Level II response or decision, the Association may request a list of seven (7) Oregon or Washington arbitrators from the Oregon State Conciliation Service who are members of the American Arbitration

Association Labor Panel. A copy of the request shall simultaneously be filed with the District. Each party shall then alternately strike one (1) name from the list supplied until one (1) name remains and that person shall be the arbitrator. In the alternative, the parties may jointly agree upon any person to serve as arbitrator. The arbitrator shall fix the time and place for the hearing but with at least five (5) days written notice to the parties.

2. Authority of Arbitrator.

The arbitrator shall issue a decision within thirty (30) days of the close of the hearing or submission of briefs, whichever occurs later. The arbitrator's decision shall be in writing and shall set forth findings of fact, reasons, and conclusions. The arbitrator may not add to, subtract from, or modify the terms of this Agreement, and may not award punitive damages. The arbitrator's decision shall be final and binding.

3. Cost.

Fees and expenses for the arbitrator shall be borne equally by the Association and the District.

4. Evidence.

Except for evidence used solely for impeachment or rebuttal or to refresh recollection, evidence shall be restricted to exhibits made known to the other party at least twenty- four (24) hours prior to the first arbitration session and to testimony from witnesses whose names were made known to such party within said time; provided that the arbitrator may, upon a showing of good cause or to prevent injustice, relieve a party from this restriction.

5. Communication with Arbitrator.

Except as expressly authorized herein, there shall be no communication between the parties and the arbitrator other than at oral hearings and those necessary to accomplish the filing of evidence, briefs and papers, to arrange the order of proceedings and to provide notice. Prior to contacting an arbitrator, the opposing party shall be given notice by the initiator.

6. Conflict of Interest.

No person shall serve as arbitrator in any arbitration in which he or she has any financial or personal interest in the result of the arbitration, unless the parties, in writing, waive such disqualifications. Prior to accepting the appointment or immediately upon receiving notice of this rule, whichever is later, the prospective arbitrator shall disclose to the parties any circumstances likely to create a presumption of bias or which might disqualify him or her. If either party declines to waive the presumptive disqualification, the vacancy shall be filled in accordance with the procedures described below.

7. Substitute Arbitrator.

If any arbitrator shall resign, die, withdraw, refuse or be unable or disqualified to perform the duties of the office, it shall be vacant and the matter may be reheard by a new arbitrator. A party desiring to fill such vacancy and continue arbitration must give notice thereof to the other party and the Oregon Employment Relations Board within five (5) days of the date of receipt of knowledge of the vacancy and request that the Employment Relations Board furnish an additional list of seven (7) Oregon or Washington arbitrators. The successor shall then be selected in the same manner as in the original selection.

## ARTICLE 12

### INSURANCE

A. The District shall continue its contributions towards the cost of providing medical insurance plans for eligible substitutes. Eligible substitutes shall be able to participate in the PAT Part-Time Option II plans (currently Kaiser or Providence). The amount paid by the substitute

towards the cost of the plan shall not increase above that being paid as of June 30, 2016. Eligible substitutes may cover their spouses and/or dependent children in the medical insurance plan on a fully self-paid basis. Insurance coverage shall cease if the substitute is terminated or fails to remain on the substitute list.

B. The District shall contribute thirty-two dollars (\$32.00) per month in 2016-17 towards the purchase of employee dental insurance for eligible substitutes, and for all subsequent years, the District agrees to increase this contribution by two dollars (\$2.00) per month per school year.

C. Eligibility for full year insurance coverage (October through September) shall be established as follows:

1. A substitute must have worked the equivalent of seventy (70) full work days in the preceding school year.

2. If a substitute who has worked at least the equivalent of seventy (70) days during seven (7) of the last ten (10) years, works the equivalent of fifty (50) or more, but less than the seventy (70) full work days in a school year, that substitute shall be considered eligible for insurance for the following school year, provided the substitute was generally available to work as a substitute teacher. Eligibility must be reestablished once this option has been exercised.

3. If a substitute accepts an offer to fill a temporary position, days worked in the temporary position shall count towards the qualifying requirement for insurance eligibility. If a substitute takes a temporary position, the District and the Trust will coordinate the substitute's enrollment between substitute insurance and temporary insurance.

4. Substitutes must be fully available to work as a substitute teacher during the current school year and must enroll when eligible in the medical/dental plan.

B. If required by law to purchase insurance from the Oregon Educators' Benefit Board (OEBB), the parties agree that, upon the Association's request, this collective bargaining agreement shall be open in its entirety for renegotiation.

ARTICLE 13  
COMPENSATION

A. Daily Rate of Pay

The daily wage rate for substitutes shall be the greater of either eighty-six and one-half percent (86.5%) of Step Bon the BA column of the regular teachers' salary schedule, or ten dollars (\$10.00) more than the published Oregon Department of Education final minimum pay rate.

B. Ten-Day Rate of Pay

After working ten (10) consecutive days in the same assignment, a substitute will be paid the greater of either the daily rate of a beginning teacher on the BA column of the regular teachers' salary schedule, or ten dollars (\$10.00) more than the published Oregon Department of Education final minimum ten-day pay rate. If at the time of posting, it is known that the assignment will last more than ten (10) days, it will be posted and paid at the Ten-Day rate starting on the first day. The use of sick leave will not be considered a break in consecutive days.

C. Additional Compensation

Substitutes required to work outside of the daily assignment, such as for writing IEPs and other plans or meeting with parents, shall be compensated at the per diem hourly rate in Section B above.

D. Incentive Pay

If a substitute fulfills an assignment at District designated schools they will receive an incentive of Ten (10) additional dollars for a full day and five (5) additional dollars for a half day. The District will decide by the first day school year for the upcoming school year,

which schools would have incentive pay and will provide the list to PAT. It is up to the District's discretion to determine what schools would receive incentive pay.

## ARTICLE 14

### DURATION

A. Except as otherwise provided elsewhere in this Agreement or in this Article, this Agreement shall become effective the day following ratification by the parties and shall remain in effect through June 30, 2019. The wage rates for all employees and sick leave accruals (for those employees still employed with the District) in this agreement shall be retroactive to July 1, 2016.

B. The District agrees to print sufficient number of copies of this Agreement to be delivered to the Association to provide to all substitute teachers. A copy of the Agreement shall also be provided to any newly hired substitute.

C. This Agreement shall take precedence over any District policy, rule or regulation, which may be inconsistent with the Agreement.

D. During its duration, the Agreement may only be modified by the mutual consent of the Association and the District. In addition, because of the passage of Ballot Measure #5 on November 6, 1990 and given a change in financial resources available to the District which would demonstrably and drastically reduce the District's revenue, the parties would agree to meet to analyze the impact and resulting status and to mutually make modifications that may be judged to be necessary and in the best interest of the parties including reopening economic or other sections of this Agreement, upon written request and notification from either party.

E. Should any part of this Agreement be declared illegal by a court or agency of competent jurisdiction, the remainder of the Agreement shall continue in effect and the parties shall enter into negotiations the section declared to be illegal within thirty (30) days of such decision.

-THIS PAGE INTENTIONALLY LEFT BLANK -

## MEMORANDUM OF UNDERSTANDING

### Substitute Systems and Assignment of Substitutes

The parties agree that if the District decides to move to a substitute system other than AESOP, the District will consult with the Association to select a replacement system. In evaluating systems and bargaining the impacts of the change to the replacement system, the parties will attempt to find and implement a system that meets the following criteria:

1. Requests to fill full-day assignments will take precedence over requests to fill partial-day assignments. However, partial-day assignments may be filled in advance when it is known that a number of substitutes will be needed because of workshops, conferences, or other occasions requiring a significant number of substitutes. Requests will be filled in the order requested. Retentions and continuing assignments take precedence over new requests.
2. In assigning substitutes, the substitute system will leave assignment information with a responsible adult, or an answering device, or via an approved messaging device prior to 9:30 PM. It will be assumed that the assignment has been accepted unless the substitute informs the system/substitute office otherwise by 5:30 AM on the day of the job. Failure of a substitute to do so shall result in that substitute forfeiting receiving assignments via the use of answering and message devices for up to one (1) semester. Repeated failure by a substitute shall result in forfeiture of the use of answering and message devices for receiving assignments.

For the purposes of bargaining the impacts of a replacement substitute system, these criteria (not AESOP practice) shall be considered a part of the status quo and shall supersede any current practices inconsistent therewith.

## MEMORANDUM OF AGREEMENT

### Bargaining Process

The District and Association agree to meet to discuss a short-term extension of the collective bargaining agreement prior to November 1, 2018. If no extension is reached, the parties will meet to discuss the bargaining process by January 15, 2019.



Signature Page:



## INDEX

SUBJECT	ARTICLE	PAGE
Academic Freedom	7D	10
Assignments		
Answering device	MOU- 2	29
Building restrictions – see “ <i>Building Restriction</i> ”	6F3	7
Classroom restrictions – see “ <i>Classroom Restriction</i> ”	6D	6
Error by Substitute Office – ½ day paid	8C3	14
Factors to be considered in making assignments	8B	14
Master & Restricted Lists		8A
13-14		
Messages left for assignments	MOU-2	29
Normal calling hours	8C2	14
Procedures for calling:	8C	14
Exception for sub requested by name for assignment	8C3	14
Full days filled first, then ½ days	MOU-1	29
Needs filled from master Listing first	8B	14
Needs filled in order received	8C1	14
Retentions + continuing assignments take precedence	8C1	14
Voluntary removal from assignments during work stoppage	8E	15
Association Rights		
Presentations and announcements at District meetings	2C	2
Appointment of Substitutes to District committees	2D	2
Conducting business on District property	2A, 2F	1-2
Mail services, mailboxes	2A	1
PAT bulletin board in each building	2A	1
Right to information	2B	1
Right to speak at Board meetings	2E	2
Use of District facilities, equipment	2A	1
Building Restriction		
Length depends on circumstances, not more than 10 school months	6F3	7
Meeting with Human Resources prior to restriction	6F4	7
Progressive discipline	6G	8
Substantive reason in substitute’s control/responsibility	6F4	7
Classroom Restriction	6B	6
Notice of teacher’s requested restriction, including reason		
Right to request meeting with teacher		
Teacher’s good faith effort to contact substitute required		

Collective Bargaining and General Contract Provisions		
Bargaining Unit – definition	1A	1
Copies of contract	14B	27
Contract section declared illegal	14E	27
Contract supersedes District policies, rules	14C	27
Duration of agreement	14A	27
District-paid release time – Bargaining Team	2H	2
Not a break in multiple-day assignment		
Effect of requirement to purchase insurance from OEBC	14B	25
Funding clause	14D	27
Management rights	4	4
No strike during term of contract	5	4
Recognition clause	1A	1
Compensation – see ‘salaries’	13	26
Complaints against Substitute Teacher		
Definition of complaint	6E1	6
Notice of complaint and time limitations	6E4	6-7
Record in personnel file	6E1	6
Right to representation	6E5	7
Right to know specifics of complaint	6E6	7
Subject to just cause if discipline results	6A1	5
Contract Administration Meetings	2G, 2I	2
Dues and Payroll Deductions	3	2-4
Association membership dues	3AB	2-3
Fair share fees	3B	3
Provide list to association	3F	4
Voluntary payroll deductions	3D	3
Withdrawing authorization for payroll deductions	2A	3
Employee Discipline		
Comments made privately	6A	5
Inform substitute of result of disciplinary proceeding	6F5	8
Just cause required	6A	5
Letter of Expectation	6E3	6
Removal from Personnel File	6B	5
Not considered discipline	6E3	6
Progressive discipline	6G	8
1 <sup>st</sup> /2 <sup>nd</sup> /3 <sup>rd</sup> reports, timing, duration	6G	8
Record of discipline in personnel file	6B	5
Right to prior written notice of reasons for meeting w/administrator	6C	5
Right to representation	6E5	7
Seek and impose lowest appropriate form of response	6F1	7

Written reprimand defined	6F2	7
Grievance Procedure	11	19-24
No reprisal for grievances	7C	10
Insurance, Medical and Dental	12	24-25
Coverage on annual basis only	12C	25
Coverage under PAT Part Time Option II	12A	24
Dental insurance – District contribution	12B	25
Eligibility	12C1	25
50 day exception	12C2	25
Medical insurance	12A	25
District contribution for eligible substitutes	12A	24-25
Self-pay for eligible substitutes for dependent coverage	12A	25
Temporary position – days worked count toward sub insurance	12C3	25
Insurance, Liability see Use of Automobile	7G	12
Notice of Meeting with Administrators	6C	15
Orientation/Professional Development – see Professional Concerns	17	9HIJ
Personnel File		
Materials relating to discipline	6AB	5
Right to review file	6B	5
Right to attach response	6B	5
Right to request removal of Letter of Expectation	6B	5
Time limit for placement of materials in file	6B2	5
Physical Examination	7A	9
Professional Concerns		
Academic Freedom	7D	10
District may provide trainings to limited groups of subs	9I	17
Selection of substitutes for these trainings		
Incorporation into assignment process		
Interview by HR to enhance applicant standing	8G	15
Orientation/Professional Development	9HIJ	17
Required trainings	9J	17
State-required abuse training		
Pay for other required trainings		
Professional development/orientation ½ day paid	9H	17
Student grades	7E	10

<b>Safety</b>		
Assault or battery by student upon substitute	7E1,2,4	10-11
Injury on job	7F	11
Liability insurance	7G	12
Loss/damage to personal property	7F2	11-12
Notice by District re: use of non-routine cleaners, etc	7H	12
Security of buildings and grounds	7H	12
Unsafe working conditions	7H	12
 <b>Salaries</b>		
Daily rate	13A	26
Dues and payroll deductions	3	2-4
Incentive pay at designated schools	13D	26
Paycheck stubs – required information	3G	4
Ten-day rate	10B	4
 <b>Sick Leave</b>		
	10	18-19
Accrual	10AB	18
Usage – rules + procedures	10CEFGH	18
Transfer from other districts	10D	18
 <b>Student Issues</b>		
Administering Health Procedures for Students	7E	10
Discipline	7E	10-11
Access to student behavioral records	7E3	11
Assault – minimum of five (5) days suspension	7E4	11
Battery – mandatory expulsion for remainder of year	7E4	11
Building discipline plan in substitute folder	7E	10
Information about students with records of violence	7E3	11
Removal of student from substitute’s responsibility	7E4	11
Serious or menacing threat of harm by student	7E2	11
Suspension or expulsion	7E4	11
Grades	7E	10
 <b>Substitute Folder, Building</b>		
Includes building discipline plan	7E	10
 <b>Substitute Lists</b>		
Assignments from Master List first	8B	14
Copy of lists, sub request numbers provided to teachers, subs	8D	15
Master List of substitutes	8A1	13
May indicate preference of assignment		
Requirement to work twenty days per school year (5 each half)	8E	15
Moving to Restricted List	8A1	13
Restricted List of substitutes and eligibility	8A2	14

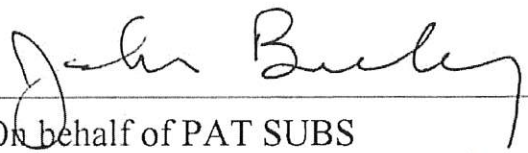
Required to work 5 days per school year	8E	15
Substitute Lists (continued)		
Assignments Substitute holding substitute license only, listed as area licensed	8H	15
Summer List of Substitutes	8F	15
Voluntary removal from assignment during teachers' lawful stoppage	8E	15
 Substitute Rights		
Discipline – see “Employee Discipline”	6	5-8
Keys	7I	13
Nondiscrimination	7B	9
Non-reprisal for grievances	7C	10
Personal Life	7I	12
Personal injury and property loss	7F	11-12
Personnel file – see “Personnel File”	6B	5
Physical examination not required	7A	9
Right to representation	6C	5
Safety – see “safety”	7H	12
Site Report Form	7J	13
 Work Day + Work Hours		
½ Day assignments – 3 hours 45 minutes	9B	16
Call in error or not needed – ½ day pay	10D	16
Full day assignments	9A	16
Not less than 7 hours;		
Start 15 minutes before student day		
End 15 minutes after last regular student period		
Minimum assignment – ½ day	9B	16
Restroom breaks	9F	16
Schedule for long-term assignment (10 consecutive days)	10C	16
Substitute teacher work day schedule	9E	16
Substitute teaching in Night School or Year-Round School	9G	16

Contract Extension Agreement Between  
PORTLAND PUBLIC SCHOOLS  
And  
PORTLAND ASSOCIATION OF TEACHERS,  
SUBSTITUTE TEACHERS

Portland Public Schools ("PPS") and the Portland Association of Teachers, Substitute Teachers ("PAT SUBS") hereby agree to the following:

- I. The 2016-2019 Agreement between PPS and PAT SUBS shall be extended for one year. The new expiration date of the Agreement shall be June 30, 2020. (This Contract Extension shall be attached as Appendix A)
- II. Except as expressly modified by this Contract Extension Agreement, the terms of the 2016-2019 Agreement will continue in full force and effect until June 30, 2020 unless the parties mutually agree otherwise.
- III. This Agreement constitutes the complete agreement between the parties regarding the terms for extending the 2016-2019 Rollover Agreement. This Agreement may only be modified through a signed agreement by both parties.
- IV. The parties will meet to discuss the bargaining process for successor bargaining by January 15, 2020.
- V. This Agreement will take effect immediately upon ratification by the PAT SUBS membership and approval by the Board of Education.

  
\_\_\_\_\_  
On behalf of PPS

  
\_\_\_\_\_  
On behalf of PAT SUBS

SUPERINTENDENT  
\_\_\_\_\_  
Title

12/14/2018  
\_\_\_\_\_  
Date

PAT/OEA Uni.Serv Consultant  
\_\_\_\_\_  
Title

12/12/18  
\_\_\_\_\_  
Date