In accordance with The Broward Teachers Union (BTU) & The School Board of Broward County (SBBC) bargaining agreement, Article 25, involuntary transfers will be made when a reduction in the number of instructional employees in a school is needed. The surplus position must be approved by the Area Superintendent and Instructional Staffing. Department heads must have approval from their Associate or Deputy Superintendent. Limited surplussing will be permitted. Surplus is restricted to: 1) reduction of staff due to boundary changes, 2) new school openings, 3) expiration of a grant or funds no longer available to fund an instructional employee’s position, 4) approved career technical education program closing, and 5) a major reduction in student enrollment.

**SURPLUS AT AN ELEMENTARY SCHOOL OR CENTER**

Elementary schools and centers must surplus by certification area. **Only PSC instructional employees can be surplussed.**

**Example #1:** If a location needs to surplus a gifted teacher, the principal must review the gifted teacher’s certification.
- If he/she is certified in elementary, the principal will post the need to surplus an elementary position and the least senior elementary certified teacher will be surplussed. The gifted teacher will be moved to a classroom position. He/she may volunteer to be surplussed or seek his/her own transfer.

**Example #2:** If a location needs to surplus a guidance counselor, the principal must review the guidance counselor’s certification.
- If he/she is only certified in guidance, the principal will post the need to surplus a guidance position and the least senior guidance counselor certified will be surplussed.
- If the teacher is certified in guidance and elementary, the principal will post the need to surplus an elementary position and the least senior elementary certified teacher will be surplussed. The guidance counselor will be moved to a classroom position. He/she may volunteer to be surplussed or seek his/her own transfer.

**Note:** Before principal approves a Volunteer Preference Form, he/she must ensure that there is a teacher on staff that can assume the volunteer teacher’s position. For example, Art teacher who is certified in art and elementary education cannot volunteer for the least senior elementary surplus teacher unless someone else on staff is qualified to teach art.

**SURPLUS AT A SECONDARY SCHOOL**

Secondary schools (middle school, high school or adult/technical center) must surplus by a subject area/program or specific positions. **Only PSC instructional employees can be surplussed.** For example, if a location must surplus a PE teacher, the principal will post the need to surplus a PE position. The least senior PE teacher will be surplussed. If a location must surplus a science-chemistry teacher, the least senior chemistry teacher will be surplussed.

**PROCEDURES TO SURPLUS**

1. Run the Reappointment Report for your location. The Reappointment Report will identify those instructional employees who will not be reappointed/terminated. The report also lists the dates you use to determine seniority when you have the need to surplus. Instructions to run the report are located at: [http://www.broward.k12.fl.us/erpdb/brite/onlinelibrary/REPORTS/hrreports.asp](http://www.broward.k12.fl.us/erpdb/brite/onlinelibrary/REPORTS/hrreports.asp).

2. Determine who your least senior Professional Service Contract (PSC) instructional employee is in the area that you must surplus by reviewing their bargaining unit date. If you have more than one PSC instructional employee with the same bargaining unit date, you must follow the tie-breaking parameters (BTU, Article 3):
   - a. The date the location submitted the preclearance in the DOV.
   - b. Earliest date of application proceeding current hire date in an instructional position in the district.
3. Meet with the least senior PSC instructional employee to inform them of your need to surplus. Let them know that you will be posting the need to surplus to request volunteers. The least senior PSC instructional employee must complete the *Instructional Surplus Preference Form* even if a more senior instructional employee volunteers to be surplussed.

4. Post the *Notice to Reduce Staff Form* to request volunteers. If there are no volunteers, the least senior PSC instructional employee will be involuntarily transferred first. However, if an instructional employee with greater seniority in the program or certification volunteers to be surplussed, the volunteer surplus must complete an *Instructional Surplus Preference Form* and indicate Volunteer Surplus. **This form must be submitted with the least senior PSC instructional employee’s Instructional Surplus Preference Form.** The volunteer must be certified in the surplus area. Volunteer Surplus school choices will be considered; however, there is no guarantee that the volunteer will be placed. If placed, there is no guarantee of requested grade or subject preference.

*Note:* Before principal approves a Volunteer Preference Form, he/she must ensure that there is a teacher on staff that can assume the volunteer teacher’s position. For example, Art teacher who is certified in art and elementary education cannot volunteer for the least senior elementary surplus teacher unless someone else on staff is qualified to teach art.

**Sample of how to complete Notice to Reduce Staff Form:**

Listed below are subject(s)/certification area(s) surplussed for the 2012-2013 school year. Do not include positions that are vacant.

<table>
<thead>
<tr>
<th>Surplus Subject/Certification Area</th>
<th>Number of positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Education</td>
<td>1</td>
</tr>
<tr>
<td>Elementary</td>
<td>1</td>
</tr>
</tbody>
</table>

5. Complete **Summary of Reduction in Instructional Staff Form** and recap subject(s)/certification area(s) surplussed on Notice to Reduce Form along with listing justification of movement for each surplus.

**Sample of how to complete Summary of Reduction in Instructional Staff Form:**

<table>
<thead>
<tr>
<th>Surplus Subject/Certification Area</th>
<th>Number of positions</th>
<th>Justification of Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Education</td>
<td>1</td>
<td>Position has been reduced to 50%</td>
</tr>
<tr>
<td>Elementary</td>
<td>1</td>
<td>Reducing music; teacher moved to an elementary position.</td>
</tr>
</tbody>
</table>

6. Scan and email **Summary of Reduction in Instructional Staff, Notice to Reduce Staff and Instructional Surplus Preference Form(s)** to CAB Conference “Reappointment Info”.

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Surplus Procedures05012012 Page 2
**Veteran’s Preference**

If the instructional employee being surplussed is a Veteran, he/she is entitled to claim Veteran’s Preference. If eligible, Instructional Staffing will review the documentation and inform the location to add additional years to the instructional employee’s bargaining unit date. If the surplus instructional employee wishes to claim Veteran’s Preference, he/she must indicate it on the Instructional Surplus Preference Form and fax the Surplus Form with the following required documentation to Instructional Staffing:


2. Copy of DD Form 214 (Certificate of Release or Discharge from Active Duty).
   a. A separate DD 214 must be submitted for each military campaign classification for which a veteran is eligible.

3. Proof of Florida Residency (one of the following):
   a. Copy of valid Florida driver’s license.
   b. Copy of Florida Voter’s Registration card.
   c. Copy of mortgage/lease agreement reflecting a Florida address.

4. Other documentation:
   - Disabled Veterans must provide documentation from the Department of Veterans’ Affairs (DVA) certifying the Veteran has a compensable service-connected disability.
   - Spouses of disabled Veterans must provide:
     o Certification from either the DVA or Department of Defense (DoD) that the Veteran is totally and permanently disabled for employment purposes due to a service-connected disability.
     o Evidence of marriage to the Veteran.
   - Spouses of those on active duty must provide:
     o Documentation from the DVA or DoD that the active duty member is missing in action, captured, or forcibly detained.
     o Evidence of marriage to the Veteran.
   - Un-remarried widow, or widower of a deceased Veteran must provide:
     o Documentation from either the DVA for service-connected death of the Veteran, or DoD line of duty death determination.
     o Evidence of marriage.
     o Statement that the widow/widower has not remarried.

**Exempt from Surplussing**

The following curricular and co-curricular activities may be exempt from surplussing if the instructional employee was in the exempt position in the current year of the surplus:

- Athletic director, those head coach positions listed in Appendix F, I, D, 2 of the BTU/SBBC Agreement, drama coach, debate coach, academic games sponsor, newspaper sponsor, yearbook sponsor, music, primary specialists, Gesell trained primary (K-3) teachers, department chairperson, team leader and grade level chairperson.

**The BTU Superseniority steward is exempt from surplussing.** The BTU will identify and provide a list to the District of one BTU super seniority steward per school.
CHANGE IN PERCENTAGE OF POSITION (INCREASE/DECREASE)

Increase (Special): If you increase a current special position, you will need to surplus 100% of the position and enter the new position into the DOV. If a PSC instructional employee is interested in the increased position, he/she can indicate it on their Instructional Surplus Preference Form; however, there is no guarantee of placement.

Increase (Other): If you increase a current position that is NOT a special, you must offer it to the current teacher. You do not need to enter it in the DOV. You will submit a PRF – Change form to update the percentage of the position. After the position has been updated in SAP, you will submit a Change in Pay iForm to move the employee to the increased position.

Decrease (All position): If you decrease a current position, you will surplus the position and enter the vacancy in the DOV. If a PSC instructional employee is interested in the reduced position, he/she can indicate this on their Instructional Surplus Preference Form; however there is no guarantee of placement.

PLACEMENT OF SURPLUS (ARTICLE 25)

Instructional employees are placed in seniority order by their areas of certification. The Volunteer Surplus Instructional Employee (PSC only) is considered first in order of seniority. If a position is not available in one of the volunteer’s surplus selected locations, the volunteer remains at the current location and the least senior instructional employee will be placed. The anticipated vacancies will be used to place the remaining surplus instructional employees.

REDUCTION IN PERSONNEL (ARTICLE 26)

When the anticipated vacancies have been exhausted, the District must invoke Article 26. At that time, the least senior instructional employees in each subject area/program or specific positions shall then be laid off. Retained employees must be qualified for their assigned positions. A laid off employee is not entitled to replace another employee in a different subject area/program. However, if the employee identified for layoff holds another certification in a subject area/program for which a vacancy exists in the system, then said employee shall be offered the vacancy if he/she is qualified for the position. The affected teachers will be notified the week of June 4, 2012. They will be placed on the layoff list for a two year period and may be recalled for employment by seniority as vacancies occur.
SUMMARY OF REDUCTION IN INSTRUCTIONAL STAFF
(Do not post this form; Submit to Instructional Staffing)

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Location Number</th>
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</thead>
</table>

It has been determined that the subject(s) listed below need to be surplussed for the 2012-2013 school year. *Do not include positions that are vacant.*

<table>
<thead>
<tr>
<th>Surplus Subject/Certification Area</th>
<th>Number of positions</th>
<th>Justification of Movement</th>
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Principal’s/Director’s Name (Print)  Principal’s/Director’s Signature

Date

*Summary of Reduction in Instructional Staff, Notice to Reduce Staff and Instructional Surplus Preference Form(s)* must be scanned and emailed to CAB Conference “Reappointment Info”.
**POSTING OF NOTICE TO REDUCE STAFF**

<table>
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<th>Location Name</th>
<th>Location Number</th>
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</table>

It has been determined that the subject(s) listed below need to be surplussed for the 2012-2013 school year. *Do not include positions that are vacant.*

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Principal’s/Director’s Signature  Date

If an instructional PSC employee is a Veteran and would like to claim Veteran’s Preference, he/she must attach the required documentation to their *Instructional Surplus Preference Form*. The required documentation can be found at [http://www.broward.k12.fl.us/teacher/veterans_pref.pdf](http://www.broward.k12.fl.us/teacher/veterans_pref.pdf).

**CLARIFICATION:** If an instructional employee volunteers to be surplussed, there is no guarantee that he/she will be placed at the school requested. If the volunteer surplus does not receive one of their school selections, he/she will remain at their current school, and the least senior instructional employee in the appropriate certification/subject area will be surplussed. A volunteer surplus can list up to ten (10) schools on their *Instructional Surplus Preference Form*. A volunteer surplus may be placed in one of their school choices and assigned to any subject area indicated on their certificate.

*Notice to Reduce Staff and Instructional Surplus Preference Form* must be scanned and emailed to CAB Conference “Reappointment Info”.
INSTRUCTIONAL SURPLUS PREFERENCE FORM

PLEASE INDICATE TYPE OF SURPLUS BELOW: (CHECK ONE)

☐ Involuntary Surplus (least senior PSC instructional employee in identified surplus area)

☐ Volunteer Surplus (this employee is volunteering for the following subject/certification area (*)) identified as a surplus position and is not the least senior PSC instructional employee):

SUBJECT/CERTIFICATION AREA

*As a Volunteer Surplus, you may be placed in one of your school choices and assigned to any subject area indicated on your certificate. If a position is not available in any of the locations you selected, you will remain at your current location and the least senior instructional employee will be surplussed.

Name: ____________________________ Personnel No: ________________

Best contact phone number: ____________________________

It is your responsibility to ensure that Employee Self Service (ESS) reflects your current home address or any temporary addresses.

Home School Name ____________________________ Location #: ______________________

Current Assignment: ____________________________ Grade(s) and/or Subject(s)

Only applicable if assigned to two schools in a shared position:

Shared School Name ____________________________ Location #: ______________________


You can list up to ten (10) schools in the District where you would prefer to be assigned. You may list schools that are not on the Anticipated Vacancy List. This list includes vacancies at the time of posting; however, additional vacancies may be received after posting. You will be considered for all locations with no preference given to the order listed.

<table>
<thead>
<tr>
<th>School Name</th>
<th>Location # (4 digits)</th>
<th>Percentage</th>
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Only list positions less than a 100% if you are in agreement with accepting a reduced position. You will remain in this position for the 2012-2013 school year.

Instructional Employee’s Signature ____________________________ Date ________________

Principal’s/Director’s Signature ____________________________ Date ________________