

# CYCLICAL REVIEWS

Personnel Commission



# OVERVIEW

- ▶ What are cyclical reviews?
  - ▶ Classification & the Role of the PC
  - ▶ Cyclical Review Process
  - ▶ Salary Allocation Process
  - ▶ Review of Study Results
  - ▶ Frequently Asked Questions
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# WHAT ARE CYCLICAL REVIEWS?

## ***A periodic, systematic and broad review of classification descriptions***

- ▶ A cyclical review calendar is established in collaboration with CSEA and the District, and approved by the PC every fiscal year.
  - ▶ The primary purpose is to determine if the job duties listed in each classification description are an accurate reflection of the work assigned.
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# CYCLICAL REVIEWS VS. RECLASS STUDIES

- ▶ **Cyclical Reviews**

Periodic, systematic and broad review of classification descriptions, based upon review calendar.

- ▶ **Reclass Studies**

Individual position reviews to determine if an incumbent (or position) is assigned to the correct classification. A request can be submitted any time.

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# ROLE OF THE PC AND THE BOARD

<i>Establish new positions</i>	<b>BOARD</b>
<i>Classify new positions &amp; prepare descriptions</i>	<b>COMMISSION</b>
<i>Classification Title</i>	<b>BOARD/COMMISSION</b>
<i>Duties performed</i>	<b>BOARD</b>
<i>Minimum qualifications/KSAs</i>	<b>COMMISSION</b>
<i>Salary surveys</i>	<b>COMMISSION</b>
<i>Recommend salary schedules</i>	<b>COMMISSION</b>
<i>Adopt salary schedules</i>	<b>BOARD</b>
<i>Reclassify positions</i>	<b>COMMISSION</b>
<i>Determine effects of reclassification</i>	<b>COMMISSION</b>
<i>Determine effective date of salary reallocation (except in reclassification)</i>	<b>BOARD</b>

# CLASSIFICATION DESCRIPTIONS

- ▶ Broad job descriptions of classified management or non-management roles, which include critical details about the scope of work, examples of duties and job requirements for one or more positions.
  - ▶ Duties listed are not exhaustive and describe at least 80% of responsibilities assigned to a position (Merit Rule 3.2.5).
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# CYCLICAL REVIEW PROCESS

## STEP 1

### NOTIFICATION

PC notifies executive administrators, supervisors, and union reps for jobs to be studied.

## STEP 2

### ORIENTATION

PC conducts employee and manager class study informational sessions.

## STEP 3

### STUDY REQUESTS

Incumbents may request position reviews, submit PDQs, and request representation if applicable.

## STEP 4

### DATA ANALYSIS

PC reviews PDQs and conducts job audits if needed.

## STEP 5

### MANAGER INPUT

PC reviews classification descriptions with supervisor and gets input on job audit findings.

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# CYCLICAL REVIEW PROCESS (Cont'd)

## STEP 6

### FACT FINDING

Additional fact-finding may be done by PC, e.g., survey comps and additional input from employees.

## STEP 7

### DEPARTMENT REVIEW

PC reviews findings with supervisor and area VP.

## STEP 8

### FISCAL IMPACT APPROVAL

PC sends results to President designees for fiscal review.

## STEP 9

### EXECUTIVE & UNION REVIEW

PC sends results for executive and union input.

## STEP 10

### EMPLOYEE REVIEW

PC notifies incumbents of results, and preliminary and administrative review procedures.

**FINAL STEP:** Agenda report with recommendations presented to the PC and Board for approval

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# POSSIBLE OUTCOMES

- ▶ No change in salary or class description
  - ▶ Minor changes in class description – no impact on salary
  - ▶ Substantial changes to class description – no impact on salary
  - ▶ Substantial changes to class description with impact on salary
  - ▶ Substantial changes to class description to warrant a new classification, salary allocation and/or position reclassification
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# RECLASSIFICATION

If there is a reclassification request submitted, the following criteria *all* must be met for reclassification approval:

- ▶ Gradual accretion of duties occurring over two (2) or more years of regular, continuous service, per the Education Code
  - ▶ Change impacts a substantial portion of the duties and responsibilities
  - ▶ Duties cannot be reassigned
  - ▶ District approves fiscal impact
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# JOB EVALUATION FACTORS

These factors account for differences between levels within an occupational hierarchy:

- ▶ Knowledge Required
  - ▶ Level of Complexity
  - ▶ Degree of Decision-Making Authority
  - ▶ Nature & Purpose of Contacts
  - ▶ Scope & Effect of Work
  - ▶ Environmental & Physical Demands
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# FACTORS NOT CONSIDERED IN CLASSIFICATION

- ▶ Longevity
  - ▶ Volume of work
  - ▶ Quality of work
  - ▶ Efficiency of performance or automation
  - ▶ Qualifications
  - ▶ Financial need
  - ▶ Dedication
  - ▶ Personality
  - ▶ Retention
  - ▶ Future Projects
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# SALARY ALLOCATION PROCESS

## 1. EXTERNAL EQUITY

- ▶ 10-15 colleges, City of Santa Monica & LACOE are surveyed
- ▶ At least 30% of sample surveyed needed for a survey
- ▶ At least moderate to strong matches (70%+) only

*If insufficient market comparables are available based on the criteria mentioned above, then pay will be determined primarily by internal analysis and past recruitment outcomes.*

## 2. INTERNAL EQUITY

- ▶ Job factor analysis within occupational hierarchy

## 3. FISCAL IMPACT REVIEW

## 4. BARGAINING UNIT REVIEW FOR REPRESENTED JOBS

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# SALARY IMPLICATIONS

- ▶ “The commission shall recommend to the governing board salary schedules for the classified service. The governing board may approve, amend, or reject these recommendations... No changes shall operate to disturb the relationship which compensation schedules bear to one another, as the relationship has been established in the classification made by the commission.”

California Education 88087

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# REVIEW PROCESS

## STEP 1

- ▶ Preliminary review of results with PC staff
  - ▶ 5 WORK DAYS

## STEP 2

- ▶ Administrative Review with Director
  - ▶ 30 CALENDAR DAYS

## STEP 3

- ▶ Personnel Commission
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# PRELIMINARY REVIEW

## PURPOSE

- ▶ Reconsideration of findings based on input from the employee, bargaining unit and/or management.

## PROCESS

- ▶ Five working days to review results and provide input before the PC meeting
- ▶ Additional fact finding by Classification & Compensation Manager to affirm results

## POTENTIAL OUTCOMES

- ▶ Changes to initial proposal
  - ▶ No changes to initial proposal
  - ▶ Table item for further consideration or Administrative Review
  - ▶ PC agenda
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# ADMINISTRATIVE REVIEW

## PURPOSE

- ▶ Ensure classification proposal is *not*
  - ▶ in violation of law.
  - ▶ a misapplication of the rules of the Commission.
  - ▶ an abuse of discretion.
  - ▶ inconsistent with facts.

## PROCESS

- ▶ Thirty calendar days to review results and provide input
- ▶ Additional fact finding by Director of Classified Personnel to affirm results

## POTENTIAL OUTCOMES

- ▶ Changes to initial proposal
  - ▶ No changes to initial proposal
  - ▶ Table item for further consideration
  - ▶ PC agenda
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# MATTERS EXCLUDED FROM PC REVIEW

- ▶ An alleged violation of any specific provision of a collective bargaining agreement
  - ▶ Number of positions allocated to a classification, assigned duties, and matters concerning wage beyond internal alignment
  - ▶ An alleged violation of District Policies
  - ▶ Complaints about the subject matter of a rule, regulation, policy, law, or administrative procedure
  - ▶ Complaints involving market comparisons and District pay policy
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# IMPORTANT CONSIDERATIONS

- ▶ Cyclical review process standardization
  - ▶ Study priorities
    - ▶ Major changes or inaccuracies in duties
    - ▶ Recruitment or retention concerns
    - ▶ Internal alignment issues
    - ▶ Market rate concerns based on stakeholder input
  - ▶ Review opportunities and order of reviews
  - ▶ Plan in place when pulling items from agenda
  - ▶ Authority of the Commission
  - ▶ Timelines for complex studies
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# FREQUENTLY ASKED QUESTIONS

- ▶ **The PC reviewed a classification description and made some changes. Why isn't the salary being reallocated at this time?**

*There are many factors to consider before salary reallocation. Most commonly, current market data, internal alignment, significant recruitment challenges, and fiscal feasibility are all considered.*

# FREQUENTLY ASKED QUESTIONS

- ▶ **What are my options if I don't agree with my classification description, duties assigned or salary?**

*An administrative review can be requested for matters within the authority of the Commission. However, management has overriding interest in determining which functions are necessary, and which are not, to accomplish the College's mission, unless the decision will result in transfer of duties for represented employees. The District has discretionary authority to determine salary, which is a matter involving bargaining if represented.*

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# FREQUENTLY ASKED QUESTIONS

- ▶ **An employee is really smart and efficient and the manager has been giving them additional assignments. Many of these assignments aren't listed in the class description for their current position. Should the PC reclassify the position?**

*A reclassification study should be requested when in doubt at any time. Most of the District's job classifications have been written with a reasonable balance between "broad" and "narrow" class descriptions to encompass a wide variety of duties and responsibilities, and narrow classifications for specialized positions. To think that an employee can't do anything outside of what's specifically stated in a job class specification is not accurate -- as long as those duties are within the overall purpose, scope, and level of the class, then the duties are likely to be appropriately assigned.*

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