



## **Personnel Commission**

# **ANNUAL REPORT 2011 - 2012**

### **PERSONNEL COMMISSIONERS**

**Mr. Michael Sidley, Chair**  
**Ms. Barbara Inatsugu, Vice Chair**  
**Mr. Joseph Pertel, Member**

### **DIRECTOR**

**Wilbert Young, Ph.D.**

Personnel Commission meetings are held once a month, generally on the second Tuesday of the month. Agendas for Commission meetings are posted outside the District's building, sent to each work location and placed on the District's website. The agenda includes the exact time, date and place of the meeting. Minutes of the meetings are placed on the District's website. Employees and members of the public are cordially invited to attend Commission meetings.

***The 2011-2012 Annual Report of the Personnel Commission is submitted in accordance with Education Code 45266 and Merit Rule 2.4.2. The report encompasses the period from July 1, 2011 through June 30, 2012.***

## **MERIT SYSTEM and the EDUCATION CODE**

The first Merit System law in the nation for school districts was passed by the California legislature in 1936 and made a part of the California Education Code.

Today, as in 1936, the Merit System provides protection through the Education Code against politically or personally motivated employment, promotion, discipline or dismissal actions

### **MERIT PRINCIPLES**

1. Recruitment of job applicants should be from sources representing all segments of society, and selection and advancement should be determined solely on the basis of relative ability, knowledge, and skills, after fair and open competition, which assures that all receive equal opportunity.
2. All employees and applicants for employment should receive fair and equitable treatment in all aspects of personnel management.
3. Equal pay should be provided for work of equal effort, skill, and responsibility.
4. School district employees should be managed and treated fairly and consistently and be engaged in work that serves the best interests of students.
5. Employees should be retained and promoted on the basis of merit, as measured by the adequacy of their performance and professional achievement.
6. Employees should be protected from arbitrary employment actions and afforded due process rights consistent with applicable law.

### **PERSONNEL COMMISSION RESPONSIBILITIES**

The Personnel Commission has three core responsibilities as defined in the California Education Code.

1. Oversee a personnel management program based on merit principles that ensure the selection and promotion of employees is based solely on qualifications through competitive examination.
2. Develop and administer policies governing employment matters to ensure the fair and equitable treatment of employees within the classified service.
3. Conduct appeal hearings on matters involving employee disciplinary action, employment examinations, and personnel policies and procedures.

### **PERSONNEL COMMISSION DUTIES**

To execute its responsibilities, the Commission performs the following duties:

- Establishes and maintains a position classification plan which includes creating job descriptions, setting minimum qualifications, and allocating classifications to salary ranges using standards that provide equal pay for equal work.
- Adopts guidelines to analyze jobs and develop valid employment examinations.
- Adopts rules and procedures to be followed concerning such employment subjects as applications, examinations, employment eligibility, hiring, promotions, discipline and other rules necessary to carry out classified personnel administration.

## DISTRICT MISSION STATEMENT

Extraordinary achievement for all students while simultaneously closing the achievement gap.

## DISTRICT VISION STATEMENT

As a community of learners, the Santa Monica-Malibu Unified School District works together in a nurturing environment to help students be visionary, versatile thinkers; resourceful, life-long learners; effective, multilingual communicators and global citizens. We are a rich, culturally diverse community that values the contributions of all its members and strives to promote social justice. We exist to assist all students in their pursuit of academic achievement, strength of character, and personal growth, and to support them in their exploration of the intellectual, artistic, technological, physical and social expression.

## DISTRICT STRATEGIC PLAN (2011-2016)

### SUPPORTING GOAL: STRENGTHEN TALENT AT EVERY LEVEL

**STRATEGY:** Recruit, develop, and retain outstanding and motivated staff who reflect the values of SMMUSD and the needs of the diverse students we serve.

#### INITIATIVES:

- Seek out and hire talented candidates
- Foster continuous improvement and leadership throughout the district
- Incorporate best practices to enhance staff effectiveness

## PERSONNEL COMMISSION VISION

Augment Santa Monica-Malibu Unified School District's Reputation as the Employer of Choice.

## PERSONNEL COMMISSION STRATEGIC PARTNERSHIP

As a strategic partner with our District, the Office of Classified Personnel is responsible for developing, implementing, and maintaining services and systems to effectively recruit, select, and retain qualified employees for our school district.

The Office of Classified Personnel is a committed organization dedicated to meeting the goals of the Personnel Commission and the Santa Monica-Malibu Unified School District. The following positions represent the Office of Classified Personnel, with a summation of the essential functions performed as related to the Personnel Commission.

#### Director of Classified Personnel

Our Director, **Dr. Wilbert Young**, carries out all the Merit System Rules and Regulations functions of the Personnel Commission, plans, organizes and directs the personnel management program for the classified service in conformance with the Education Code, and supervises, and evaluates the performance of assigned staff. Dr. Young leads the Merit Rules Advisory Committee and is a member of our Superintendent's District Leadership Team.

## PERSONNEL COMMISSION STRATEGIC PARTNERSHIP CONTINUED

### Administrative Assistant

Our Administrative Assistant, **Jana Hatch**, prepares Personnel Commission agendas, supporting documentation and minutes, maintains department files and records, and responds to various requests for information. She is also responsible for tracking all performance evaluation records for both permanent and probationary classified employees and handling rater requests received from external agencies. Ms. Hatch participates in meetings with our District's Sustainability Coordination team.

### Human Resources Analyst

Our Human Resources Analyst, **Stephanie Perry**, conducts employment recruitment, testing and selection for confidential, supervisory and management positions, researches and designs structured examination methods to meet the District's need for qualified employees, conducts position classification and compensation studies, analyzes personnel policies, rules and legal issues, administers the web-based recruitment and applicant tracking system, and serves as a team leader for career development workshops, procedural forms development, and annual report preparation. Ms. Perry serves as a member of our District's Intercultural Equity and Excellence Advisory Committee.

### Human Resources Technicians

Our Human Resources Technicians (**Cindy Johnston, Beth Papp** and **Julie Younan**) conduct employment recruitment, testing and selection for bargaining unit classifications, coordinate substitute assignments, handle summer (and inter-session) employment assignments, develop seniority lists, support the development and facilitation of career development workshops, assist in performing job analyses, salary surveys and exam development, and provide information to the Director (and participate in meetings) regarding accommodation and layoff matters.

Ms. Johnston and Ms. Papp serve as key members of our Merit Rules Advisory Committee.

Ms. Younan serves as a member of our Superintendent's District Leadership Team.

## PROFESSIONAL MEMBERSHIPS OF STAFF

Staff maintains memberships with the following professional organizations to build networks of professional colleagues, exchange ideas, and stay abreast of current developments, trends and best practice. (With the exception of CSPCA and CODESP, staff pays the cost of individual memberships in these organizations in light of current budget considerations.)

- California School Personnel Commissioners Association (CSPCA)
- Cooperative Organization for the Development of Employee Selection Procedures (CODESP)
- International Public Management Association for Human Resources (IPMA-HR)
- National Career Development Association (NCDA)
- Personnel Testing Council-Southern California (PTC-SC)
- Southern California Public Management Association-Human Resources (SCPMA-HR)

## PROFESSIONAL DEVELOPMENT OF STAFF

Staff attended the following conferences and seminars to enhance their knowledge and skill related to Merit System School Districts. (Most seminars were delivered via free webcasts. Staff paid costs associated with conferences in light of current budget considerations.)

### California School Personnel Commissioners Association Annual Conference: The Fresh Face of Merit, January 2012

- Intergenerational Differences [Robin Guerin, Ph.D., Orange County Dept. of Education]
- The Real Truth About Success: Having the Personal Influence to Make Change Work [Garrison Wynn, Author]
- Bridging the Gap & Rebranding the Merit System [Suzy Seymour & Acacia Thede, Garden Grove Unified School District]
- Managing Workplace Conflict [Debra Dupree, Relationships That Matter, Inc.]
- Strategic Planning for Merit System Districts [Victoria Wintering, Anaheim Union High School District]
- Merit's Role in the Diversity / Engagement / Productivity Puzzle [Jeff Feuquay, Psychology-Law Center, LLC]
- Legal Updates [Kristine Kwong, Husick, Peeler & Garrett, LLP]

### Cooperative Organization for the Development of Employee Selection Procedures (CODESP)

- Avoiding Salary Survey Nightmares\*
- Change Leadership: Ramping up Your Ability to Cultivate Change in Your Life & Organization\*
- Employee Engagement: Keys to a Culture of Excellence
- Maximizing Health and Productivity in Turbulent Times\*
- Structured Interviews: the Process of Building and Conducting Valid and Legal Interviews\*

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\* represents seminars co-sponsored by CSPCA

### CPS (Public Sector) HR Consulting

- Empower Your People: Enrich Your Organization
- Process Improvement

### Human Resource Executive Online ~ April 2012

- Rethinking Career Development—Strategies for Building and Implementing an Effective Program

### Personnel Testing Council of Southern California (PTC-SC) Lunch Seminar ~ September 2011

- Making Statistics Work at Work

### Personnel Testing Council of Southern California (PTC-SC) Annual Conference: Embracing New Challenges and Solutions in HR and Assessment ~ November 2011

- Employment Assessment as Part of a Holistic Talent Management Strategy
- Job Analysis: An Essential Human Resource Tool
- Situational Judgment Testing
- Why Is This Necessary? Return on Investment in Personnel Assessment

### NEOGOV™ Insight Online Training

Staff participated in a variety of training opportunities via self-running tutorials and live webcasts.

## Recruitment and Examination Activities

<u>Activity</u>	<u>2010-2011</u>	<u>2011-2012</u>
<b>Personnel Requisition (Position Control) Forms Received</b> <i>The Position Control form is used to initiate recruitment. This form serves as clearance from the fiscal department for expenditure of salary funds.</i>	-	240
<b>Transfer Bulletins</b> <i>Section 8.2.2 of the bargaining unit agreement requires that "All vacancies as defined in article 8.1.2 shall be posted at work locations for six (6) days."</i>	46	40
<b>Job Interest Cards Submitted</b> <i>Job seekers may file Job Interest Cards when they are interested in a job that is not currently being recruited for.</i>	1,104	2,211
<b>Recruitments</b> <i>Recruitments are initiated for the purpose of filling vacancies and creating Eligible Lists for anticipated permanent or substitute opportunities.</i>	51	53
<b>Applications Received and Evaluated</b> <i>Applications are reviewed for minimum education and experience requirements and verification that all application requirements are met. Staff notifies each applicant of acceptance or rejection of the application.</i>	2,283 (92% online)	3,736 (98% online)
<b>Examinations Developed</b> <i>In accordance with Merit Rule 5.2., examinations are developed to contain test parts that relate to job requirements. Persons who are experts in their field of work were consulted to provide input into the Job Analysis. Job Analysis is a systematic process of determining the skills, duties, and knowledge required for performing jobs in an organization. This process establishes a legally defensible foundation for exams, ensuring exams are content valid and reliable predictors of future performance.</i>	17	26
Written	-	10
Structured Interview	-	8
Performance	-	7
Training & Experience Evaluation	-	1
<b>Examinations Administered</b> <i>In accordance with Merit Rule 5.2., examinations are administered objectively. Both technically qualified internal employees and those from external agencies gave their time and expertise to serve as raters on structured interview and performance examination panels.</i>	119	134
Written	92	101
Structured Interview	20	19
Performance	7	14
Training & Experience Evaluation	0	0
<b>Candidates Scheduled for Examinations</b> <i>Applicants who meet minimum education and experience requirements are invited to participate in the exam process. Staff notifies each applicant of exam date, time and location.</i>	-	1,435
Written	-	1,195
Structured Interview	-	145
Performance	-	95
Training & Experience Evaluation	-	0
<b>Examination Protests</b> <i>In accordance with Merit Rule 5.3., candidates may file a written protest of any part of an examination. Staff conducted a thorough evaluation of the exam process to determine the validity of the twenty-one protests submitted. Additionally, we offer candidates the opportunity to review the outcome of an exam with staff to overview scores, gain insight on the process and offer suggestions for possible improvements on such exams.</i>	-	21

## Recruitment and Examination Activities CONTINUED

<u>Activity</u>	<u>2010-2011</u>	<u>2011-2012</u>
<b>Eligibility Lists Promulgated</b> <i>These lists contain the names of candidates who were successful in all parts of the exam. Candidate names are arranged in the order of the total score (exam score plus additional points) from highest to lowest. Candidates with the same total score are assigned to the same rank.</i>	55	51
<b>Number of Eligible Candidates</b> <i>The Eligibility Lists promulgated in 2011-2012 contained five hundred and fifty candidates.</i>	-	550
<b>Certifications Summaries to Hiring Authorities</b> <i>These summaries list of the top three ranks of eligible candidates to interview.</i>	-	148
<b>Eligible Candidates Scheduled for Interview</b> <i>Staff schedules interviews upon learning of the hiring manager/administrator's availability and preferences.</i>	-	622
<b>Bilingual (Spanish) Stipend Oral Exam Administered</b> <i>Section 16.8.5 of the bargaining unit agreement requires that "unit members receive a 5% salary differential when frequently required to converse with students and/or members of the public who cannot speak English." Unit member must pass the oral exam in order to receive the salary differential.</i>	-	8
<b>Number of Candidates Scheduled for Bilingual (Spanish) Exam</b>	-	28

## Employment Activities

<u>Activity</u>	<u>2010-2011</u>	<u>2011-2012</u>
<b>Job Offers-New/Promotional</b>	125	176
<b>Job Offers-Substitute/Provisional</b>	-	96
<b>Advanced Step Requests</b> <i>In accordance with Merit Rule 12.4, relevant experience and/or education in excess of entry requirements may permit employment at other than the first step of the appropriate salary range.</i>	25	31
<b>Daily Substitute Assignments</b>	318	258
<b>Summer (and Inter-session) Assignment Requests</b> <i>In accordance with Merit Rule 7.3.2, when the Board establishes temporary positions during the summer recess (winter and spring inter-session), permanent employees who work less than 12 months per year may apply for these positions. Employment assignments are determined by seniority.</i>	791	661
<b>Professional Expert Requests</b> <i>In accordance with Merit Rule 3.1.5, professional experts may be hired for limited term assignments. This process is often used when the person does not meet the IRS' independent contractor criteria, but possess a specialized background.</i>	98	83

## Classification Activities

<u>Activity</u>	<u>2010-2011</u>	<u>2011-2012</u>
<p><b>New Classifications Developed</b></p> <p><i>As a result of the growth of our Facility Permits department, three new job classifications were developed. Staff reviewed job functions, scope of work, employment requirements and salary to conduct internal relationship comparisons and to perform an external market study of similar positions in other agencies</i></p>	3	3
<p><b>Classifications Revised</b></p> <p><i>Ten job classifications were reviewed and revised to more adequately reflect current duties and responsibilities, knowledge, skills and abilities, licenses, working environment and physical demands of the work being performed.</i></p>	7	10
<p><b>Classification Studies</b></p> <p><i>The duties and responsibilities of two positions were reviewed to determine proper classification. Both reviews were initiated at the request of the employee in accordance with Merit Rule 3.2.7.</i></p>	4	2
<p><b>Reclassification Studies</b></p> <p><i>One reclassification was completed as the result of gradual accretion of duties in accordance with Merit Rule 3.3.1.</i></p>	2	1
<p><b>Working out of Class Requests</b></p> <p><i>Section 29.2 of the bargaining unit agreement requires "When a unit member is assigned to perform work beyond that indicated in the definition of the class to which he/she is assigned, he/she shall be compensated as of the first (1<sup>st</sup>) day"</i></p>	42	37 (Includes 4 extensions)

## Talent Management

<u>Activity</u>	<u>2010-2011</u>	<u>2011-2012</u>
<p><b>Employee Performance Evaluations-Permanent Employees</b></p> <p><i>Article 5.1.1 of the bargaining unit agreement requires "an annual record of work performance as an aid to achieve and maintain high levels of performance."</i></p>	-	340
<p><b>Employee Performance Evaluations-Probationary Employees</b></p> <p><i>Article 5.4.2 of the bargaining unit agreement requires "formal evaluation of all unit members in probationary status by the end of the second and fourth months of service and prior to the completion of the sixth month."</i></p>	-	69
<p><b>Career Development Training Sessions</b></p> <p><i>The Personnel Commission staff offered Career Development Training Module 3 (Interview Skills Workshop) to classified and certificated district employees on April 4 and April 11, 2012. Staff provided theoretical as well as "hands on" training to prepare internal candidates for selection interviews in order to increase promotional opportunities. Workshop attendees expressed their satisfaction with the training in an exit survey.</i></p> <p><i>Career Development Training was initiated in June 2009 based on an assessment of employee training needs. Module 1 (Applications and Resumes) and Module 2 (Test and Interview Preparation) were "rolled-out" at that time. Module 3 (Interview Skills Workshop) was developed in 2010 in response to employee requests.</i></p>	4	2



## Ancillary Activities

<u>Category</u>	<u>2010-2011</u>	<u>2011-2012</u>
<b>Employee Layoff Meetings</b>	-	13
<b>Disciplinary Notices</b>	-	6
<b>Merit Rules/Chapters Revised</b>	6	3
<b>Rater Requests Received and Responded To</b> <i>External agencies regularly contact us to secure District staff to give their time and expertise to assist on structured interview and performance examination panels.</i>	168	235
<b>Rater Panel Participation</b> <i>In response to rater requests, District employees assisted on structured interview and performance examination panels at the following agencies: City of Inglewood, City of Santa Monica, Culver City USD, Long Beach USD and Santa Monica College.</i>	19	18
<b>Personnel Commission Agendas</b> <i>During 2011-2012, agendas were prepared for 12 regular meetings and 4 special meetings of the Commission. Electronic posting of the full agenda on our District's website was initiated October 11, 2011.</i>	16	16

## Online Job Application & Career Portal

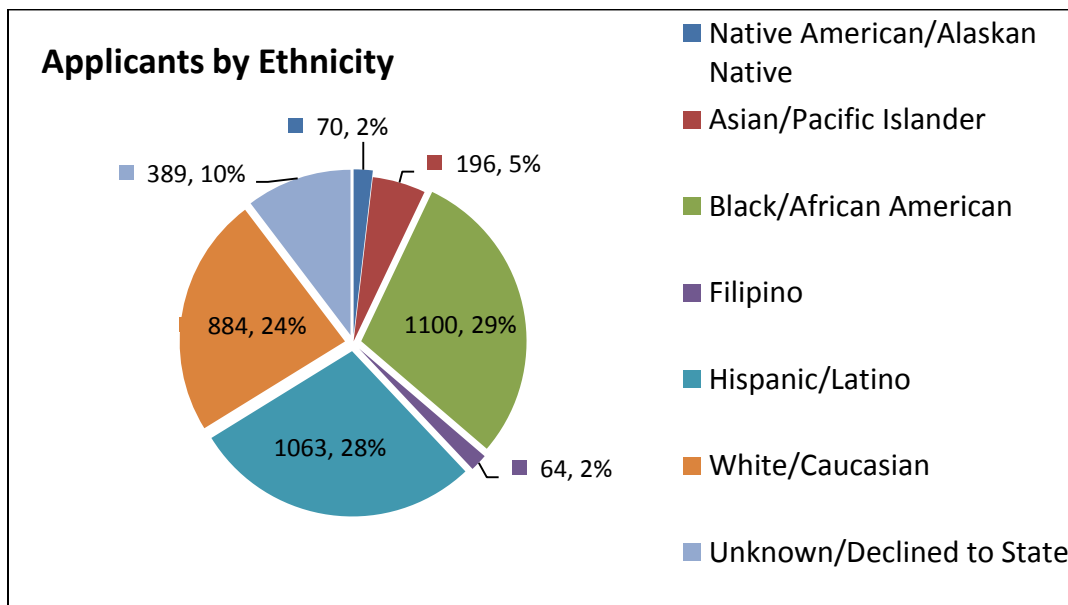
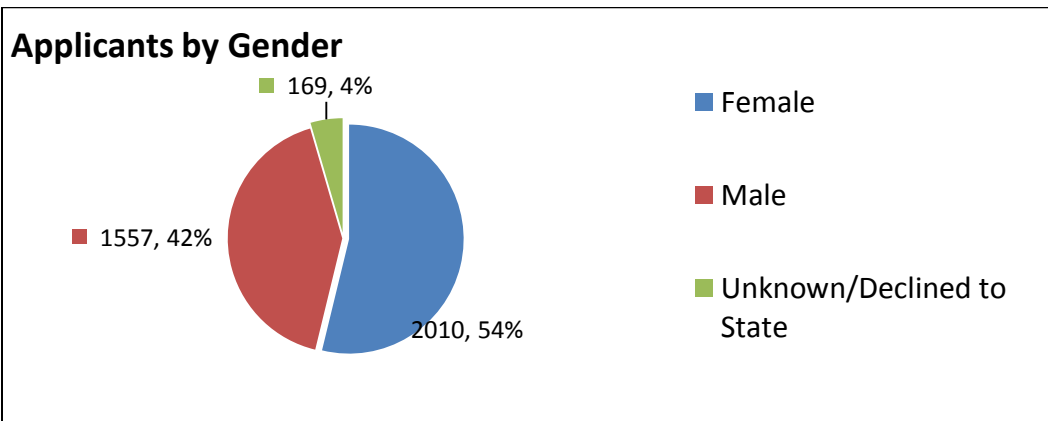
The web-based NEOGOV™ Insight system provides staff with a tool to receive and evaluate the **3,736** applications submitted during 2011-2012. This system enables staff to generate notices (email and hard copy), schedule qualified applicants for exams, and track applicants throughout the selection process. Applicants may use the self-service career portal to check the status of their applications and submit online job interest cards.

Staff configures and maintains the administrative tables and databases that are required for day-to-day recruiting processes such as personnel requisition tracking, job posting creation, application processing, and exam administration.

Regular system audits are conducted to ensure databases are accurate, consistent and error free. Staff has established a monthly process to review (and merge) duplicate applicant master profiles. The need for this arises when applicants create multiple accounts to apply for jobs in the Governmentjobs.com system. Once merged, all applications, attachments, exam and eligibility list information is combined under a single applicant master profile and conflicting data (contact and personal information, preferences, etc.) is resolved. During 2011-2012, **427** applicant profile records were reviewed and merged as appropriate.

## Applicant EEO Summary Data

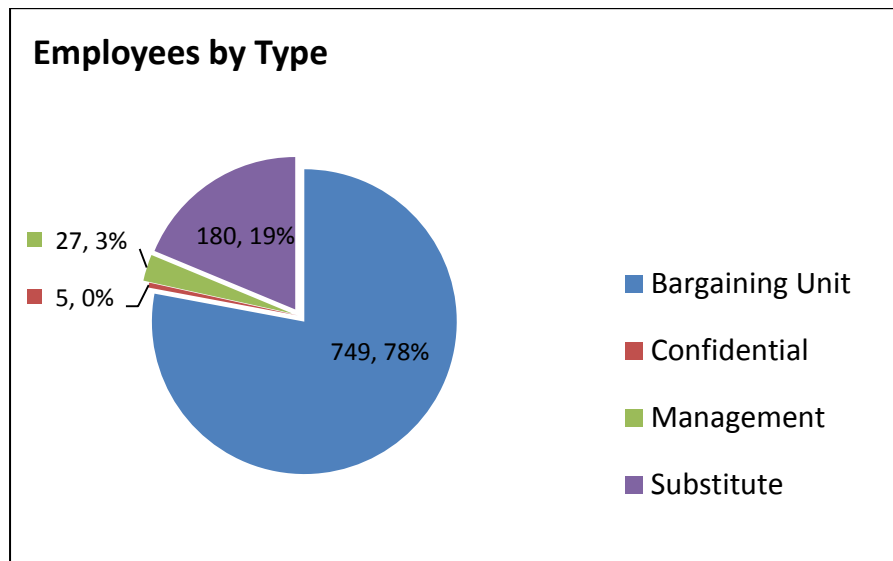
<u>Category</u>	<u>2010-2011</u>	<u>2011-2012</u>
<b>Applicant Total</b>	2,283	3,736
<b>Gender</b>		
Female	1,211	2,010
Male	882	1,557
Unknown/Declined to state	190	169
<b>Ethnicity</b>		
American Indian <u>or</u> Alaska Native	3	70
Asian <u>or</u> Pacific Islander	93	196
Black <u>or</u> African American	590	1,100
Filipino	41	64
Hispanic <u>or</u> Latino	579	1,063
White	618	884
Unknown/Declined to state	359	389
<b>Veteran Status</b>	-	81



## Classified Employee Data

<u>Type</u>	<u>June 2011</u>	<u>June 2012*</u>
<b>Classified Bargaining Unit Employees</b>	-	749
<b>Classified Confidential Employees</b>	-	5
<b>Classified Management Employees</b>	-	27
<b>Classified Substitute Employees</b>	-	180
<b>Total:</b>	-	961

\* Source: Human Resources Information System as of June 20, 2012



*On behalf of the Personnel Commissioners and the Santa Monica-Malibu Unified School District, we sincerely appreciate the following agencies for assisting our District in serving as raters on our structured interview and performance examination panels:*

- *City of Santa Monica*
- *Culver City Unified School District*
- *Los Angeles County Office of Education*
- *Santa Monica College*
- *San Gabriel Unified School District*

## **ANNUAL REPORT**

### **2011-2012**

Santa Monica-Malibu Unified School District

Personnel Commission

Office of Classified Personnel

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Santa Monica, CA 90404

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**A special thanks goes out to all staff who contributed to the preparation  
and publication of 2011-2012 Annual Report.**