

**Report of the
University of California, Berkeley Library
Task Force on Reclash Policy and Procedures**

June 27, 2002

Recommendations:

Because of the recently implemented salary decentralization policy across the campus, the Library has only approximately one half of the funds, \$150,000, that were previously available for staff salary increases due to reclassifications. In order to implement new reclassification policies and procedures in light of the funds available, the Task Force recommends that effective July 1, 2002:

1. the Associate University Librarians and Directors should be actively involved in assigning new duties to staff, in consultation with their managers and supervisors, to ensure that reclasses will be triggered for job-related changes that are linked to the Library's highest priorities;
2. the AULs and Directors proactively review, plan, and schedule reclassification requests in their units in consultation with their managers and supervisors;
3. the AULs and Directors should be aware of the reclassification and temporary reclassification requirements in the five contracts that apply to the Library and award reclassification salary increases, equity adjustments, and stipends within budgetary guidelines for staff on both 19900 and other funds;
4. Cabinet should inform the library staff of the budget process and principles they will use to allocate the approximately \$150,000 available for reclassification requests, equity adjustments, and stipends across the Library each year;
5. Library Cabinet should adopt the new Berkeley Supplemental Standards to the Library Assistant series developed by the Library Classification Committee and reviewed by the Task Force;
6. the Library Cabinet should adopt the appended revised charge to the Library Classification Committee to a). bring its procedures more in line with CAPA's principles of collegiality and confidentiality, b). return to the principle of rotating chairs, and c). continue its reporting line to the University Librarian rather than to LHRD, which will become advisory to the Classification Committee (see Appendix B for a revised charge to the Classification Committee);

7. the Library Classification Committee should continue its work using the current Supplemental Standards until the Library receives campus approval to implement the updated Supplemental Standards. The Committee then may use the new Supplemental Standards;
8. the Task Force should release its report to the library staff after it is reviewed by Cabinet and hold another Early Bird with the AULs and Directors to answer any questions from library staff;
9. the Director of LHRD will be responsible for maintaining information about the new policies and procedures on the LHRD website and for presenting annual workshops on staff reclassifications for staff, managers, and supervisors;
10. the University Librarian, in consultation with the Library Cabinet, should periodically review the charge of the Library Classification Committee.

Background:

On February 5, 2002 University Librarian Tom Leonard sent a message to all Library staff asking for volunteers for a task force on Library reclass policy.

Tom stated in his message: "The Chancellor has directed The Library, along with all campus units, to fund reclass related salary increases from our existing budgets. This is a break with the practice of central campus funding for successful reclass actions. This new policy represents a challenge for the Library, in that every dollar we allocate for reclass-based salary increases represents a permanent decrease for other library operations."

Please see Appendix A for the Task Force's charge.

The Task Force first organized an Early Bird on February 26th to inform the library staff about its charge. The co-chairs, Elise Woods and Lee Leighton, led a discussion about revising the process of staff reclassifications in light of the end of campus funding for reclassification salary increases and the smaller amount of recurring funds that the Library would be able to spend for that purpose.

The Task Force members felt that the staff understood the problem facing the Library and the gravity of the situation after the Early Bird. There is a general feeling among the library staff that the library assistant salaries in particular are too low. Studies have shown that the salaries of campus staff members lag approximately 8% behind

comparable salaries in the Bay Area. Library assistants and their union representatives state that LA salaries are 12% behind comparable local salaries. Because of the low salaries, library assistants and their supervisors have viewed the reclassification process as a means to regularly upgrade library assistant salaries. Consequently, the Library Classification Committee has reviewed and approved nearly 90 staff reclassifications in the past several years at a cost of approximately \$300,000 in salary increases a year.

In beginning to address its charge, the Task Force discussed various possible outcomes, and it began a lengthy process of information gathering. Kay Starkweather from the Library Human Resources Department informed the group about the several reclassification processes for staff in addition to the process for reclassification of staff in the Library Assistant series, with which we were most familiar. In addition, Kay pointed out that the reclassification process and salary setting after a reclassification are two separate functions that are sometimes confused. She also suggested that the most effective way to implement new budgetary guidelines for reclassifications was to have the AULs and Directors become more involved in the entire reclassification process.

Willyce Kim and Sheila Wekselbaum interviewed Scott Dinkelspiel, a Compensation Specialist in the campus Office of Human Resources. They learned from Mr. Dinkelspiel that:

- there is no campus requirement for a letter of notification after a reclassification. A short letter should be sent to the employee informing him or her of the decision about the reclassification decision. If the reclass is successful and a bargaining unit like CUE is involved, it would be helpful to say that the salary setting would be done after the required 60 day notification to the bargaining unit. That way the employee will know the reclass has been approved, but he or she will have to wait 60 days for the salary setting;
- the minimum documentation required by the campus for submitting a reclassification request is the new job description, the supervisor's checklist, and an organization chart. Mr. Dinkelspiel does not feel that he needs to see the old job description;
- the success rate for reclassifications sent to the campus is 90% (NB, the success rate within the Library for reclassifications in the LA series is the same);
- in salary setting after a reclassification, Mr. Dinkelspiel suggests looking at several factors such as market rate for the position, internal equity, bargaining unit, and performance especially if the employee has unique skills. Ideally it is best to look at the individual job and the impact of the job on the campus;

- it was too early for Mr. Dinkelspiel to know how other departments are handling the decentralization of reclass budgets.

Amy Kautzman and Elise Woods reviewed the five staff contracts that apply to the Library, the Research Unit, Clerical Unit, Technical Unit, Service Unit and Personnel Policies for Staff Members (PPSM). The first four contracts stipulate the percentage of salary increase or the step increases for reclassifications or temporary reclassifications. Increases to the minimum of the new salary range or 1 step are required by the Clerical, Technical and Service contracts. The contract for the Research Unit requires a 4% salary increase. Salary increases in the higher ranked open ranges may be as much as 25%. Excerpts from the relevant portions of the five contracts are appended.

On March 27, 2002 University Librarian Tom Leonard also sent a charge to the Library Classification Committee asking them to:

- review the Supplemental Standards to ensure that they are comprehensive and current;
- address new duties not covered in the Berkeley Supplemental Standards;
- review the Supplemental Standards to broaden the scope of the Library Assistant positions to include regular training and self-education, so that the routine addition of new tools and processes do not trigger reclassification requests; and
- develop a matrix of duties performed by Library Assistants at the various levels so that the documentation necessary for reclassifications could be reduced to a questionnaire filled out by the employee and supervisor.

Kay Starkweather then invited interested library staff to help the Library Classification Committee in its deliberations.

On April 18, 2002 co-chairs Elise Woods and Lee Leighton reported on the Task Forces deliberations at a Library Cabinet meeting. They also presented an interim recommendation:

- The Task Force on Reclass Policy & Procedure recommends that the Associate University Librarians and Directors receive, sign, and date each reclassification packet submitted by their staff before handing them on to the Library Human Resources Department. The signature acknowledges that the packet is complete, containing an old job description, a new job description, an organization chart and a supervisor's checklist. The Associate University Librarian or Director may also include a letter of support or a letter stating why he or she does not support the reclassification request.

On May 9, 2002 Cabinet also discussed an interim policy limiting reclassification salary increases to 5% or to the bottom of the range for reclasses into jobs in open ranges.

Both recommendations were accepted and noted in the Cabinet minutes.

Wendy Hanson Fatemah Van Buren
Amy Kautzman Judith Walker
Willyce Kim Kathryn Wayne
Jim Spohrer Sheila Wekselbaum
Elise Woods, co-chair Lee Leighton, co-chair

Appendix A

The Task Force was charged to:

- review the process by which staff reclassifications are currently triggered, handled, and approved (not limited to LAs);
- recommend policies and procedures that will ensure reclasses will be triggered for job-related changes that are linked to the Library's highest priorities;
- ensure the recommended policies and procedures are equitable and affordable (i.e., current library finances allow for a reclass salary pool of about \$150,000 per year, compared to past campus funded reclasses that ranged from \$200,000 to \$300,000 per year);
- give direction on the role of supervisors in the reclass process;
- recommend an average salary increase target for reclassified positions(e.g., 5%, 10%);
- identify campus and contract issues that affect the staff reclassification process;
- identify resources from campus Human Resources and the Executive Vice Chancellor to help with this transition;
- suggest ideas for the continuing education of staff and management about the staff reclassification policy; and
- present an interim report to Cabinet at the midpoint of the Task Force deliberations.