



Pacific Grove Unified School District

Organizational Review of the Human Resources Department Board Presentation

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Scope and Methodology—Operational Review

- **The Pacific Grove Unified School District (District) requested that School Services of California Inc. (SSC) conduct an Organizational Review of the Human Resources (HR) Department specific to the District’s operations in the following areas:**
 - **Department organizational structure, culture, and staffing**
 - **HR general policies procedures, including identification of annual regular activities, staff training/development, and communication practices**
 - **Recruitment, selection, hiring, and onboarding**
 - **Comparative analysis of the staffing and organizational structure of the HR Department as compared to other identified school districts**

SSC staff conducted interviews with District staff to discuss job responsibilities and workload

Documents provided by the District were also reviewed

The review is focused on the function of the departments and a measure of productivity

The analysis is not evaluative of the staff members in the positions within the departments

Key Observations: HR Operations

- **Overall impressions are that staff value the efforts of the HR Department and acknowledge their commitment to supporting employees with positive engagement.**
- **From the employment perspective, the District maintains a recruitment profile which represents a highly desirable place to work, and historically, the HR Department has relied upon the competitive recruitment capabilities as the plan to fulfill staffing needs.**
 - **The past practices have been disrupted by the transformational changes brought on by the pandemic, and the influx of temporary funding resources which have intensified hiring needs within the District.**
- **The District's HR Department organizational structure reflects the similar staffing levels found in small districts.**
 - **The department staffs minimal full-time equivalents (FTE) to handle the HR Department functions, and it is observed that the department is staffed appropriately.**
 - **While the staffing levels are determined to be sufficient, it is the distribution of FTE within the department and the use of partial positions which require further consideration.**

HR Department: Comparative Staffing Table Summary

- A comparative staffing analysis was conducted for HR department staffing with a group of similarly sized unified school districts (USDs).

	<i>Pacific Grove USD</i>	Bishop USD ¹	Carmel USD	Carpenteria USD	Golden Valley USD	Gonzales USD ¹	River Delta Joint USD	San Lorenzo Valley USD
Executive Management Staff	—	—	1.00	—	1.00	—	—	1.00
Management Staff	1.00	—	1.00	1.00	—	1.00	1.00	—
Supervisory Staff	—	—	—	1.00	—	1.00	—	—
Department Staff	2.4375	2.00	—	1.00	1.00	1.00	—	1.00
Administrative Support Staff	—	1.00	2.00	—	—	—	—	—
Total FTEs	3.4375	3.00	4.00	3.00	2.00	3.00	1.00	2.00
Enrollment	1,812	1,958	2,264	2,099	2,311	2,181	2,241	5,534
Enrollment/FTE	527.13	652.67	566.00	699.67	1,155.50	727.00	2,241.00	2,767.00
Rank	1	3	2	4	6	5	7	8

Source: District-provided data

¹District did not respond to the data request; data used for the study was gathered from the district's website and has not been verified by the district

²2020-21 California Department of Education DataQuest Enrollment data

Key Observations: HR Department Comparative Staffing

HR Department Leadership (Figure 7: page 16)

- The District provides the median overall management staffing with 1.00 FTE, along with Golden Valley USD, River Delta Joint USD, and San Lorenzo Valley USD.
- Carmel USD, Carpinteria USD, and Gonzales USD include the highest level of management staffing with 2.00 FTE.
- HR department leadership in the comparative group is provided by executive-level management positions in only three of the comparable districts (Carmel USD, Golden Valley USD, and San Lorenzo Valley USD).

Department Staffing (Figure 8: page 17)

- Duties assigned to the department staff job classifications are analytical and technical in function and duties typically require a high level of analysis.
- The District staffs 2.4375 FTE in this job category and ranks 1 of 8, which is the highest FTE in this job category in the comparable group—the District staffs partial FTE in this area which is an outlier within the comparative group.
 - Some responsibilities assigned to these positions, volunteer management and receptionist duties, are not HR functions.

Administrative Support Staffing (Figure 9: page 18)

- Positions in administrative support staff job classifications are focused on administrative and clerical support duties and should be utilized in coordination with the analytical and technical positions.
- The District does not staff in this job category, providing no support in the administrative support function; however, some duties assigned to the analytical and technical positions are administrative in function.

Key Observations: HR Department Organization

- **It is common for the organizational characteristics of smaller districts to reflect departments that include hybrid functions within the central office, and staff positions which are “utility” in purpose as they serve multiple roles within their assigned areas.**
 - **The District’s hybrid organizational structure within HR is significant due to the partial allocations of FTE within the department and duties related to community engagement (receptionist) that are assigned within HR.**
 - **The partial FTE assignments among the department staff positions create confusion in terms of responsibility areas, and the part-time assignments create gaps in coverage during certain periods of the fiscal year, and during normal work hours.**
 - **The partial FTE assignments should be reconsidered due to the unrealistic split of positions which make it difficult for the positions to function as intended.**
 - **The District Office Receptionist duties should be designated to one position that is assigned full- time to handle community engagement and support internal and external customer service needs.**

Key Observations: HR Department Position Analysis

- **The essential duties assigned to the Director are extensive and include a wide range of responsibilities, which influences the workload of incumbents of the position.**
 - **Although the Director job description is focused on District operations, in practice, the position is narrowly focused on other compliance matters which minimize the ability of the Director to oversee HR operations.**
 - **In order to maximize the function of this leadership role, it is recommended that the District modify the focus of the position.**
- **The Specialist and Technician positions support employment matters within the HR Department, and the roles of these positions are directly related to the District's ability to attract and retain employees.**
 - **It is determined that modifying the duties assigned to the Specialist and Technician positions will alleviate the workload stressors within the department, in addition to creating a more streamlined approach to employment processes.**

Recommendations: Revised HR Organizational Chart

**Executive Director of
Human Resources
(1.0 FTE)**

**Personnel
Specialist
(1.0 FTE)**

**Personnel
Specialist
(1.0 FTE)**

**District Office
Receptionist
(1.0 FTE)**

**Executive
Director**

- Department Leadership
- Employee/Employer Relations
- Strategic Recruitment Planning
- Employee Complaints Officer
- Employee Performance Management (certificated and classified)
- Negotiations
- Employee Disciplinary Matters (certificated and classified)
- Staffing Allocations and Enrollment
- Employee Leave Oversight
- Credential and Assignment Monitoring
- Bargaining Agreement Interpretation
- Position Control Monitoring

**Personnel
Specialist**

- Recruitment (DO, MOT, PGMS, PGHS, CHS, Adult School)
- Interview Coordination
- Employee Management—Certificated and Classified (A-K)
- Employee Orientation
- Position Control
- DOJ Processing—Employees
- Professional Growth
- Escape Maintenance (annual work calendars, requisitions)
- New Hire Handbook
- Negotiations Research
- Process Annual Professional Plan
- Process Annual Employee Trainings

**Personnel
Specialist**

- Recruitment (RDE, FGE, Coaches)
- Classified Testing
- Athletic Recruitment
- Guest Teachers File Management
- Employee attendance
- Interview Coordination
- Employee Management—Certificated and Classified (L-Z)
- Employee Orientation
- Position Control
- Professional Growth
- Escape Maintenance (annual work calendars, requisitions)
- DOJ Processing—Employees
- Negotiations Research

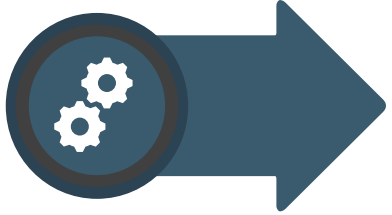
**District Office
Receptionist**

- District Office Reception
- Community Engagement—Volunteer Management
- DOJ Processing
- Event Coordination
- Employee Recognition Records
- HR Staff Web Page Maintenance
- Employee Directory
- Record Transcripts
- Student Data Management (CRDC, CALPADS, CALSAAS, CBEDS)
- Duties Related to Support for All District Office Departments

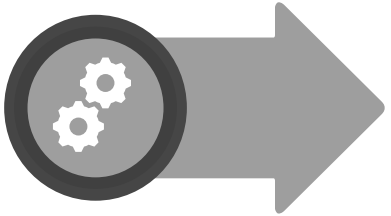
Key Observations: HR Department Procedures and Communication

- **Documentation submitted during fieldwork reflects that the District does not track complaints via a complaint log and there are currently no processes in place which delegate responsibility to direct supervisors to investigate low-level concerns.**
- **To varying degrees, the HR Department has relied upon the skills and abilities of individuals in managing District operations rather than operational standards and formal operational policies and procedures.**
- **In terms of training for HR staff, many report that their experience was a “sink or swim” circumstance when they were newly hired or transitioned to a new role.**
- **Review of documentation submitted during fieldwork reflects that the HR department has not created written standards which communicate department commitments to a standard of work, or timelines in the production of work.**
- **The HR Department should continue to use an annual calendar to ensure it meets all timelines required by policy, statute, and local collective bargaining agreements.**

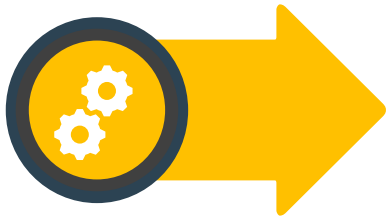
Key Recommendations: HR Department Operations



- It is recommended that the District modify current practices related to complaint management to alleviate workload constraints for the Director position.



- It is recommended that each position in the HR Department create procedure documentation which is shared electronically in a shared file. The procedures should then be shared with site administrators during administrative meetings and reinforced by administration to ensure compliance.



- Provide professional learning opportunities for all HR staff. Professional development is essential in ensuring that HR staff have the tools and job knowledge necessary to perform their jobs effectively.

Key Observations: HR and Payroll Operations

- Interviews conducted during fieldwork indicate a gap in the communication flow between HR and Payroll, and a large part of the breakdown is attributed to the personnel requisition process.
- The current practices within the District utilize various forms to document personnel changes. The number of forms, purpose, and required process for each form is attributed as the core reason for the difficulties in this area.

Personnel Form	Purpose
Personnel Action Form (PAF)	<ul style="list-style-type: none"> • Request/initiate recruitment need (sites and hiring managers utilize the form to request hiring process) • Requests for additional duty and overtime
Board Assignment Order	<ul style="list-style-type: none"> • Used for Board notification of hiring activity
Golden Rod	<ul style="list-style-type: none"> • Sent to payroll to communicate Board approval and verification of change made in Escape

Figure 18: page 39

- During fieldwork, the District was working on the personnel requisition procedures and implementing a digitized process. The District is encouraged to eliminate the use of multiple forms and processes to communicate personnel needs and changes and integrate the forms to a single document, the PAF.

Key Observations: Personnel Action Form (PAF)

- The PAF procedures should include:
 - Documented steps for processing, the designation of authorization responsibility, and a modified workflow for new positions, which includes verification of Board approval of any staffing allocations that are new personnel expenditures.
 - The workflow, procedures, and standardized timelines should be documented and communicated to all educational partners involved in the process.

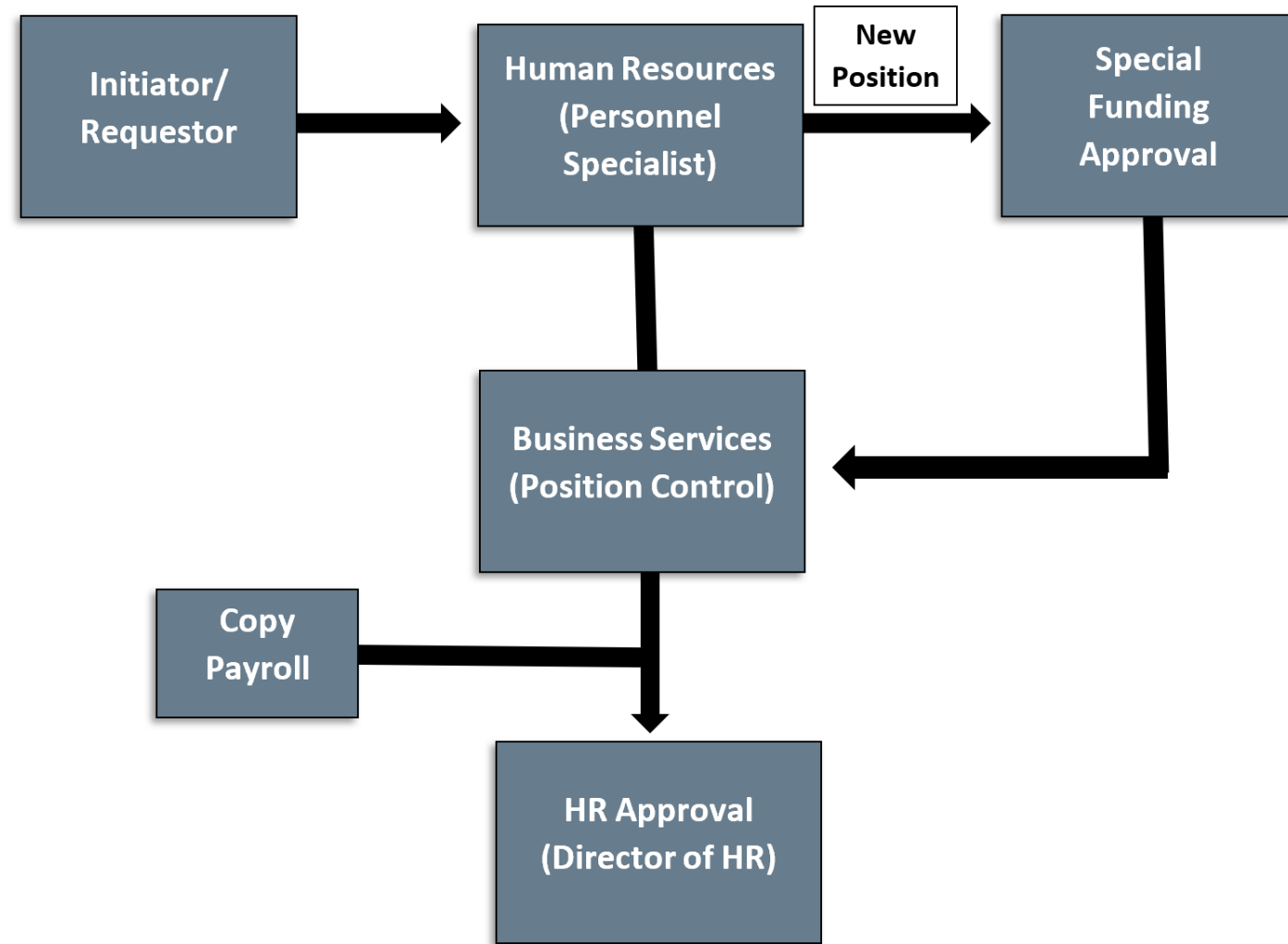
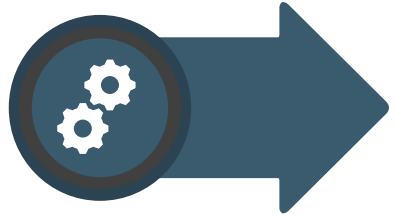
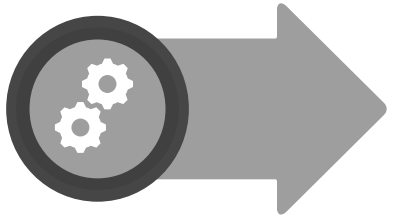


Figure 19: page 41

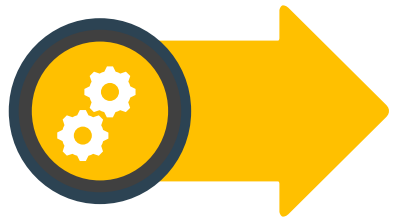
Key Recommendations: HR and Payroll Operations



- **The District should continue the modification process of the current personnel communication forms and integrate the information to one form: the PAF. The PAF should include pertinent information in the management of position control and accurately depict the approval procedures.**



- **Adjust the PAF approval process to reflect a system of accountability and improve efficiencies in personnel management. This allows for approvers to have necessary information to make decisions regarding personnel changes.**



- **Due to the complexities of personnel management, the routing process of the PAF should include both HR and Business Services position control oversight in the process to provide opportunity for verification of the staffing need and other employment details.**

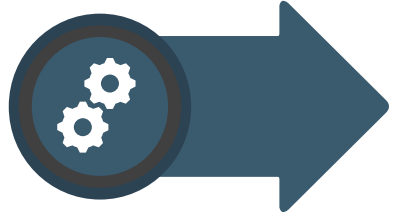
Key Observations: Employee Recruitment and Onboarding

- The District's recruitment profile is strong, and staff report that vacancy announcements for certificated and classified positions typically attract a high number of applicants.
 - Historically, the District's reputation has been sufficient to fulfill the staffing needs, which alleviated the pressure on the HR Department to respond strategically to recruitment.
 - The transformational changes brought on by the pandemic and the increased emergency funding resources have exposed some of the operational challenges within the District, which have influenced hiring capabilities.
 - The District has experienced fluctuations in hiring and attrition trends, with an increase in certificated and classified terminations in 2020-21, which is likely due to the workforce trends that occurred during the pandemic:

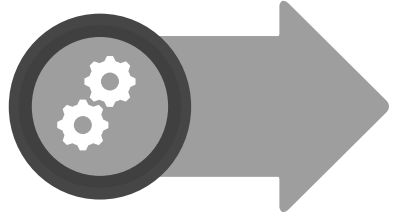
Fiscal Year	Number of Classified Employee New Hires	Number of Certificated Employee New Hires
2020-21	10	5
2021-22	34	15
¹ 2022-23	21	15
<i>Average</i>	<i>21.67</i>	<i>11.67</i>

Figure 24: page 49

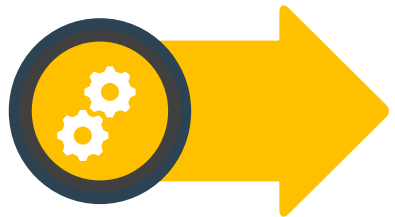
Recommendations: Employee Recruitment and Onboarding



- **Develop a comprehensive recruitment plan and budget. The recruitment plan should address the staffing needs of the District based on enrollment projections and any changes to programs or services being provided, as well as transfer and reassignment procedures.**



- **In order to ensure the District's hiring processes are legally compliant, and to ensure they support a diverse workforce, it is imperative that hiring managers are provided with formal and ongoing training on recruitment and selection procedures.**



- **The HR Department's recruitment plan should include objectives to increase diversity in the applicant pools.**
- **It is recommended that the District continue to monitor recruitment practices and identify procedures which present hiring barriers and eliminate them from the recruitment and selection process.**

Recommendations: Employee Recruitment and Onboarding

- **Revise Recruitment, Selection, and Onboarding Procedures: Implementation Plan**

Procedure	Operational Action
Standardize Posting Timelines	<ul style="list-style-type: none"> • Minimize job posting dates to help compress the recruitment timelines • Establish the job posting duration based on position type—management typically will post longer due to the higher skill level of candidates, while entry level can post for two weeks or less • Positions posted near the start of school should reflect expedited recruitment timelines
Establish Candidate Screening Process	<ul style="list-style-type: none"> • Candidates should be screened by a supervisor who possesses the expertise of the job • Provide access to hiring managers to candidate pools
Revise Selection Processes	<ul style="list-style-type: none"> • Structure interview processes to reflect the position • Hiring manager notifies candidate of their selection and offers employment contingent on hiring requirements
Establish Onboarding Procedures	<ul style="list-style-type: none"> • Eliminate the multi-step process and streamline procedures to provide access to new hire paperwork and information • Digitize the onboarding process and process new hire paperwork through an electronic process

Closing Thoughts

- **As the District works to implement the recommendations provided in this report, establishing operative assignments of work, implementing efficient procedures, and engaging in effective communication practices are the important pillars of the plan.**
- **In order to implement the recommendations in a timely manner, the District should develop an accountability chart that identifies the employees responsible for planning, scheduling, and organizing the implementation activities.**
- **The recommendations in this analysis do not apply in isolation, rather, they interact with each other on various levels. In order for particular recommendations to be successfully implemented, certain modifications must also be in place with fidelity.**
- **This report includes a prioritized—by category—implementation plan to assist the District in addressing the findings observed in the analysis.**
- **It is noted that all recommendations in this analysis are important; the categories do not represent that one recommendation is more important than the other.**



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Thank you!

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