

Workshop #3 – Labor Relations

Introduction

This document summarizes the third Human Resources Information System requirements workshop dealing with Labor Relations held on Monday, May 21, 2001. The first section is a matrix of labor relation processes and their system requirements. The matrix encompasses the *new or enhanced* data and information requirements discussed in the workshop. The data and information currently used in PPS, including those in development (e.g. online merits), are assumed to be default requirements of any replacement system. Additionally, existing data and information that supports other HR office processes (e.g. Applicant Tracking, Academic Personnel System) will continue to be a requirement. The second section is a list of secondary, “satellite” systems that were mentioned during the workshop. The third section, the opportunities for improvement, outlines areas for potential process redesign that came to the forefront during the Workshop. The final section captures the policy issues that arose throughout the workshop discussion.

Section 1: Labor Relations Process Matrix

Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
Election Process				
Determine which job classifications belong in a bargaining unit	Name	Both	High	<ul style="list-style-type: none"> Centered on campus in the past, but there needs to be a shift to system wide because information is needed at the system level
	Employee ID	Both	High	
	Title	Both	High	
	Supervisory Position	Both	High	
	Confidential	Both	Medium	

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Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
	Data lookup based on Appointment, not Employee	Both	High	for negotiations and in Sacramento. <ul style="list-style-type: none"> The biggest challenge is figuring out who people are and eliminating coding errors. Because there are only a handful of confidential jobs, is there an easier way to indicate than a separate field?
Collect data on duties of employees to determine if employee is in correct classification	Supervisor	Both	Medium	<ul style="list-style-type: none"> Title Code System does not capture who is a supervisor in a consistent manner. Stop gap measure is to create one supervisory code for each area to properly identify legitimate supervisors.
	Confidential	Both	Medium	
	Ability to capture different pay grades for the same position	Both	High	
Multi Unit Representation	Identify all bargaining units in which the employee has an appointment	Both	High	<ul style="list-style-type: none"> OP can put out rules and regulations for titles but campuses will circumvent them to creatively compensate employees – Leads to unions receiving
	Identify the unit in which the employee is eligible to vote	Both	High	

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Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
	Ability to freeze the population during election periods	Both	High	Leads to unions receiving incorrect eligibility data. <ul style="list-style-type: none"> At the time population is frozen, anyone eligible can not have changes made to their job.
	Need to track two rates for the same title based on whether an employee is covered or not	Both	High	
Dues/Agency Fees				
Handle people with multiple appointments	Code that would indicate they had multiple appointments	Both	Medium	Different unions have different policies for collecting dues from employees in multiple units (e.g. UPTE collects fees for only one appointment; AFSCME collects fees for each appointment).
	Flexibility to handle union fees/dues that are separately negotiated	Both	Medium	
Pre Bargaining				
Handle pre bargaining information requests from Union	Overtime	Both	High	Currently campuses have a difficult time meeting requirements in a timely manner.
	Amount Paid	Both	High	
	Hours on Call	Both	High	
	Performance ratings	Both	High	
	Merit associated with rating	Both	High	
	Forecasting ability	Both	High	
	Reclassified employees	Both	High	
	Promotion increases	Both	High	
	Incentive award program	Both	Medium	
Info on ancillary wages	Both	High		

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Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
	All employee history data needed for bargaining in one place	Both	Medium	
	Ability to reconcile step increases with percentage increase promised to unions	Both	Medium	
Multi year wage settlements	System must handle paying retroactively	Both	High	<ul style="list-style-type: none"> • Can take months to settle. • Retroactive pay has historically caused problems and errors.
Bargaining				
Unions want to see resulting pay rates for each proposed increase scenario	System should provide real time data	Both	High	<ul style="list-style-type: none"> • Needs for bargaining are similar to those of pre bargaining. • Union not as willing to except excel based version of forecasts that may differ from the ultimate system outcome. • Union wants more refinement that UC is capable of providing. • Performance ratings differ by campus.
	Forecasting ability	Corporate	High	
	Access to employee data	Both	High	
	Field to capture whether background check is needed	Both	Medium	
	History of merit increases tied to performance ratings	Both	High	
	Electronic job descriptions	Both	Medium	
	Indicator of whether someone is eligible for a wage agreement or not	Both	Medium	
	Automated process to handle mass change	Both	High	

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Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
	Access to costing data for negotiators (web, PDA, etc.)	Corporate	High	
Wage Settlement	Report to employee detailing what they were making and the impact of the raise(s)	Both	Low	Tax implications often lead to pay increase effective dates differing across campuses.
	Consistent effective date for pay increases across campuses	Both	Medium	
Other Information Requests				
Grievances	Flexibility to report on grievances by step, contract article, how many, etc.	Both	High	Campuses would need to provide consistent detail of level one and two grievances.
	Store all the detail and text of the decision	Both	High	
	Implement system wide	Both	Medium	
	Store unfair labor practices	Both	Medium	
Layoffs/Rehire/Recall	Common definition of a layoff unit	Both	High	
	Automation of seniority points towards layoff	Both	Medium	
	Integrated with employment system for recall or preferential rehire for an open position	Both	Low	

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Labor Relations Process	Labor Relations System Requirement	Campus/Medical Center, Corporate, or Both	Priority Level	Comments
Strikes	Need a way to identify employees on strike and who are at work	Both	High	Access to data is needed without relying solely on the departments for information.
	Need to stop pay checks through mass action	Both	Medium	
	Access to absentee data to find who was on strike	Both	Medium	
	Identify union stewards	Both	Medium	
	Salary adjustments for strikers	Both	High	
Payroll Deductions	Create deductions by unit	Both	High	Currently details are not pulled over to the corporate database; resides only in payroll.
	Track deductions	Both	High	
General Requirements				
Store, view, and search union contracts electronically	On-line union contracts	Both	Medium	Currently in .pdf format; would like them in an easier format to manipulate and search like HTML.
Provide consistent data between corporate and campuses	Flexible corporate system	Both	High	If there were a corporate system that was flexible enough to accommodate special campus needs, there would be buy in.

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Section 2: Secondary Satellite Systems

- Pay increase forecasting for bargaining - UCSB
- Reclass Tracking system - UCSB
- Incentive Award Tracking – UCSB
- Pay leave system – accruing and accounting for vacation leave - UCSB

Section 3: Opportunities for Improvement

1. Position control – Duties of position and job descriptions
2. Clarify and make consistent the definitions of eligibility
 - a. Defined using Employee data or Appointment data?
 - b. Definition of Supervisor/Confidential/Students
 - c. Definition/ID of supervisors
3. Bargaining – Need for Payroll and/or Compensation payroll
4. Development of a system wide grievance management system
5. Rethink composition of bargaining teams, campus “representatives”, etc.
6. Establish standards for the bargaining process, caucuses, etc.
7. Streamline collective bargaining decision-making process

Section 4: Policy Issues

1. Budget disconnect – need to manage expectations of the Union through accurate forecasting and assumptions
2. If a system is developed that meets all campus needs, then the need to develop individual campus systems is greatly reduced
3. Guidelines for campuses in case of strike
4. Must address union presumption that legislative appropriations drives management’s wage increase decision (related to #1)
5. Should revisit university-wide philosophy of relations with unions, organizing and collective bargaining to address reality
6. Should develop labor relations strategic plan to consist with other planning initiatives – New Business Architecture, etc.
7. Should organize a “fresh start” to labor relations, in concert with labor unions

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APPROVAL: Labor Relations Workshop Documentation

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