



BEAUMONT-CHERRY VALLEY WATER DISTRICT
560 Magnolia Avenue, Beaumont, CA 92223

**NOTICE AND AGENDA
MEETING OF THE PERSONNEL COMMITTEE**

*This meeting is hereby noticed pursuant to
California Government Code Section 54950 et. seq.*

Tuesday, July 15, 2025 - 4:30 p.m.
560 Magnolia Avenue, Beaumont, CA 92223

TELECONFERENCE NOTICE

*The BCVWD Personnel Committee members will attend in person at the
BCVWD Administrative Office*

This meeting is available to the public via Zoom teleconference

To access the Zoom conference, use the link below:

<https://us02web.zoom.us/j/85792068838?pwd=cFArZHZ4aHRSUmJLeTBCZVpnUGRmdz09>

To telephone in, please dial: (669) 900-9128
Enter Meeting ID: 857 9206 8838 • Enter Passcode: 457586

***For Public Comment, use the “Raise Hand” feature if on
the video call when prompted. If dialing in, please dial *9 to
“Raise Hand” when prompted***

Meeting materials will be available on the BCVWD’s website:

<https://bcvwd.gov/document-category/personnel-committee-agendas/>

PERSONNEL COMMITTEE MEETING – JULY 15, 2025

Call to Order: Chair Covington

Roll Call

	John Covington, Chair
	Lona Williams

	Andy Ramirez (alternate)
--	---------------------------------

PERSONNEL COMMITTEE MEETING – JULY 15, 2025 - *continued*

Public Comment

PUBLIC COMMENT: RAISE HAND OR PRESS *9 to request to speak when prompted. If you are present in the Conference Room, please fill out a Request to Speak card and deliver it to the Recording Secretary.

At this time, any person may address the Committee on matters within its jurisdiction. However, state law prohibits the Committee from discussing or taking action on any item not listed on the agenda. Any non-agenda matters that require action will be referred to Staff for a report and possible action at a subsequent meeting.

Please limit your comments to three minutes. Sharing or passing time to another speaker is not permitted.

1. **Adjustments to the Agenda:** In accordance with Government Code Section 54954.2, additions to the agenda require a unanimous vote of the legislative body members present, which makes the determination that there is a need to take action, and the need to take action arose after the posting of the agenda.
 - a. Item(s) to be removed or continued from the Agenda
 - b. Emergency Item(s) to be added to the Agenda
 - c. Changes to the order of the Agenda

ACTION ITEMS

2. **Acceptance of Personnel Committee Meeting minutes**

Minutes may be accepted by consensus

- a. June 17, 2025 Regular Meeting (pages 4 - 9)

3. **Report / Update from BCVWD Employees Association** (no staff report)

Association Representatives		
Andrew Becerra	Luis Lomeli	Ericka Enriquez

4. **Report / Update from BCVWD Exempt Employees** (no staff report)

5. **Human Resources Department Report** (pages 10 - 12)

6. **Policies and Procedures Manual Updates / Revisions**

a.	Policy 3000	Employee Status	pages 13 - 22
b.	Policy 3005	Compensation	pages 23 - 30
c.	Policy 3010	Employee Performance Evaluation	Pages 31 - 43
d.	Policy 3180	Nepotism, Employment of Relatives and Fraternization	pages 44 - 57

PERSONNEL COMMITTEE MEETING – JULY 15, 2025 - *continued*

7. **Update on Policy Tracking Matrix** (pages 58 - 61)
 - a. Status of Policy Revisions / Updates
8. **CalPERS Health Insurance Increases FY 2026** (pages 62 - 66)
9. **Quarterly Risk Management Report – Apr-Jun** (pages 67 - 70)
10. **Launch of the 2025 Annual Engagement Survey Through Great Place to Work**
(pages 71 - 72)
11. **Action List for Future Meetings**
 - Employee Association topics
 - Policy manual updates (ongoing)
12. **Next Meeting Date: August 19, 2025**
13. **Adjournment**

NOTICES

AVAILABILITY OF AGENDA MATERIALS - Agenda exhibits and other writings that are disclosable public records distributed to all or a majority of the members of the Beaumont-Cherry Valley Water District Personnel Committee in connection with a matter subject to discussion or consideration at an open meeting of the Committee are available for public inspection in the District's office, at 560 Magnolia Avenue, Beaumont, California ("District Office") during business hours, Monday through Thursday from 7:30 a.m. to 5 p.m. If such writings are distributed to members of the Board less than 72 hours prior to the meeting, they will be available from the District Office at the same time or within 24 hours' time as they are distributed to Board Members, except that if such writings are distributed one hour prior to, or during the meeting, they can be made available in the Board Room at the District Office. Materials may also be available on the District's website: <https://bcvwd.gov/>. (GC 54957.5)

REVISIONS TO THE AGENDA - In accordance with §54954.2(a) of the Government Code (Brown Act), revisions to this Agenda may be made up to 72 hours before the Meeting, if necessary, after mailings are completed. Interested persons wishing to receive a copy of the set Agenda may pick one up at the District's Main Office, located at 560 Magnolia Avenue, Beaumont, California, up to 72 hours prior to the Committee Meeting.

REQUIREMENTS RE: DISABLED ACCESS - In accordance with Government Code §54954.2(a), and the Americans with Disabilities Act (ADA), requests for a disability related modification or accommodation, including auxiliary aids or services, in order to attend or participate in a meeting, should be made to the District Office. Notification of at least 48 hours in advance of the meeting will generally enable staff to make reasonable arrangements to ensure accessibility. The Office may be contacted by telephone at (951) 845-9581, email at info@bcvwd.gov or in writing at the Beaumont-Cherry Valley Water District, 560 Magnolia Avenue, Beaumont, California 92223.

CERTIFICATION OF POSTING: A copy of the foregoing notice was posted near the regular meeting place of the Personnel Committee of Beaumont-Cherry Valley Water District and to its website at least 72 hours in advance of the meeting (Government Code §54954.2(a)).



BEAUMONT-CHERRY VALLEY WATER DISTRICT AGENDA
560 Magnolia Avenue, Beaumont, CA 92223

MINUTES OF THE PERSONNEL COMMITTEE MEETING
Tuesday, June 17, 2025, at 4:30 p.m.

CALL TO ORDER

Chair Covington called the meeting to order at 4:45 p.m.

ROLL CALL

<i>Directors present:</i>	<i>John Covington, Lona Williams</i>
<i>Directors absent:</i>	<i>None</i>
<i>Staff present:</i>	<i>General Manager Dan Jagers Director of Finance and Administration Sylvia Molina Director of Information Technology Robert Rasha Human Resources Manager Ren Berioso Water Utility Superintendent Julian Herrera Executive Assistant Lynda Kerney</i>
<i>BCVWD Employee Association reps:</i>	<i>Ericka Enriquez, Andrew Becerra</i>
<i>Members of the Public:</i>	<i>None</i>

PUBLIC COMMENT: None.

ACTION ITEMS

- 1. Adjustments to the Agenda:** None.
- 2. Acceptance of Personnel Committee Meeting minutes**
 - May 20, 2025 Regular Meeting

The Committee accepted the meeting minutes by the following vote:

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

- 3. Report / Update from BCVWD Employees Association:** None

4. Report / Update from BCVWD Exempt Employees: None.

5. Report from Human Resources Department

Human Resources Manager Ren Berioso presented highlights of the report:

- Currently 48 employees
- Notable anniversaries including Anthony Cove (30 years), and Dwan Lee (27 years)
- An Engineering Intern position is under recruitment
- Year To Date Turnover rate is 6.19 percent (an improvement over 2024)

The Committee discussed the turnover rate and Director Williams asked for comparisons to other agencies, and whether temporary employees should be included.

Chair Covington asked if the Engineering Intern position had been filled; and General Manager Jaggars explained that the candidate who was hired never showed up.

6. Policies and Procedures Manual Updates / Revisions

Human Resources Manager Ren Berioso presented the proposed revisions to the following policies:

a.	Policy 3030	Gift Acceptance Guidelines
b.	Policy 7009	Drone Usage
c.	Policy 7010	Electronic Signature
d.	Policy 7012	Accessibility

a. Policy 3030 Gift Acceptance Guidelines

Mr. Berioso emphasized the ethical considerations of gift acceptance by both employees and Board members. The revisions are in alignment with the current, holistic review of the District's ethics policies. He drew attention to added language and the parallel with the Conflict of Interest Code and Fair Political Practices Commission (FPPC) guidelines. The Committee discussed the gift limit of \$100 and considered removing the reference altogether. Reference was included to applicable FPPC thresholds and definitions. Additional clarifications were made regarding edible gifts, meals, and other exceptions. The Committee directed staff to strike the section on declining gifts.

The Committee recommended Policy 3030 for consideration by the Board of Directors with the recommended changes by the following vote:

MOVED: Covington	SECONDED: Williams	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

b. Policy 7009 Drone Usage

Berioso explained that the proposed Drone Usage Policy was reviewed to establish operational and safety guidelines for both aerial and underwater drones used by District staff. Staff explained that drones are used in critical infrastructure inspections and must comply with Federal Aviation Administration (FAA) and Federal Communications Commission (FCC) regulations. The Committee discussed operator certification, confirming that employees operating drones must possess FAA Part 107 remote pilot certification. The District provides access to training and certification programs for interested staff. It was clarified that third-party contractors hired for drone work must also provide proof of FAA certification and meet all policy requirements. The policy restricts use of drones over private property without consent, prohibits surveillance or non-district uses, and mandates annual review. Director of Information Technology Robert Rasha provided details on operational protocols, including use of FAA authorization applications and insurance coverage.

The Committee recommended Policy 7009 for consideration by the Board of Directors by the following vote:

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

c. Policy 7010 Electronic Signature

The Committee considered a new policy governing electronic signatures to ensure secure, legally compliant digital signing practices. The policy stipulates that only District-approved signature systems may be used, and authorizations must be vetted by the Director of IT. If an employee resigns or their role changes, their signature credentials will be revoked. The Committee discussed technical safeguards and audit processes for ensuring security and preventing unauthorized use. Staff explained that digital signatures tied to employee credentials are required, and any misuse triggers system alerts. PDF signatures may be permitted if they are digitally signed and verifiable. The policy includes prohibited uses, such as sharing credentials or using signatures for non-District business.

The Committee recommended Policy 7010 for consideration by the Board of Directors by the following vote:

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

d. Policy 7012 Accessibility

The Accessibility Policy was introduced to ensure digital resources are compliant with the Americans with Disabilities Act (ADA) and accessible to individuals with disabilities. Staff emphasized that the policy covers both internal tools and public-facing platforms. Key provisions include employee responsibilities for creating accessible content, training facilitated by IT, and auditing of digital tools for compliance. Public accommodation requests are addressed through the District website, where the public can report accessibility issues. Committee members inquired about alternative formats, which include printed materials, translations, or audio versions. Rasha demonstrated how accessibility requests submitted via the website are routed in real time to the appropriate departments.

The Committee recommended Policy 7012 for consideration by the Board of Directors by the following vote:

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

Chair Covington called Item 9 out of order.

9. Revising the District's Organizational Chart and Salary Schedule

Director of Finance and Administration Sylvia Molina reminded about the salary survey conducted last year and the recommendations made. Consultant HR Dynamics identified four positions that required more than a salary review, with three determined to be misclassified and requiring adjustment.

Ms. Molina outlined the four positions and the recommended changes. First, the Assistant Director of Finance and Administration position was recommended for elimination, as it was a flex assignment that has since been absorbed without fiscal impact. Second, the Customer Service Supervisor position would be reclassified as Customer Service and Billing Manager to reflect expanded duties including high-level billing analysis, internal audits, budget responsibility, and public outreach. The proposed change includes a 5 percent salary step increase, with a fiscal impact of \$6,154, which will be offset by savings from a previously vacant position, resulting in no net budget impact.

The third recommendation was to reclassify the Human Resources Manager as Human Resources and Risk Manager, with expanded responsibilities for safety programs, risk management, legal updates, and internal employee training. The proposal also includes reassigning the position to report directly to the General Manager. This change would result in an \$11,001 salary increase, but the cost would be offset within the existing budget due to the way step increases are projected annually. The fourth proposed change was to retitle the Director of Information Technology as Director of Information Technology and Cybersecurity to formally recognize the cybersecurity leadership demonstrated by the incumbent and to ensure that any future holder of the role maintains that standard. No fiscal impact was associated with this title change.

General Manager Daniel Jaggars noted that these changes reflect appropriate realignments, particularly the shift of Human Resources back under the General Manager. Committee members voiced support for the proposals.

The Committee recommended the amendments to the Organizational Chart and Salary Schedule for consideration by the Board of Directors by the following vote:

MOVED: Covington	SECONDED: Williams	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

7. Update on Policy Tracking Matrix

Mr. Berioso reviewed the dashboard, noting that an HR audit revealed additional policies that need further review.

The Committee acknowledged the July presentation of policies:

3000	Employee Status
3005	Compensation
3010	Employee Performance Evaluation
7013	Personally Identifiable Information
7014	Artificial Intelligence (AI)

by the following vote:

MOVED: Williams	SECONDED: Covington	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

8. Emergency Response Plan (ERP) – Joint Revision by Human Resources Division and Operations Department

Mr. Berioso reviewed the revisions to the ERP. He assured that the District is in compliance with current regulatory requirements and the ERP includes the current best practices and industry standards, while considering the District's operational needs. He emphasized that the Plan was done in-house and highlighted the collaborative efforts of all department heads.

The plan is to conduct trainings monthly through the Emergency Response Committee, Mr. Berioso continued. In response to a question from a Board member, staff identified four important Federal Emergency Management Agency (FEMA) trainings. He also

advised that fire extinguisher training will be provided on July 17. He confirmed for Director Williams that Board members may attend trainings.

Chair Covington pointed to the Emergency Operations Center and asked about the extent of training with departments and mock scenarios and roles. Mr. Berioso and Mr. Jagers noted starting points and current cross-training, indicating that moving forward, things would be more organized (but time consuming). Covington recommended establishing EOC responsibilities, and suggested CERT training. Director Williams recommended training everyone.

The Committee received and filed the Emergency Response Plan by the following vote:

MOVED: Covington	SECONDED: Williams	APPROVED
AYES:	Covington, Williams	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

9. Revising the District's Organizational Chart and Salary Schedule

This item was heard earlier in the meeting.

10. Update: BCVWD 2026 Operational Budget Timeline

Ms. Molina reviewed the timeline and explained that should any new positions be recommended for inclusion in the FY 2026 budget, they will be brought to the Personnel Committee starting in September for discussion.

In response to Director Covington, Ms. Molina indicated the budget process began in May.

11. Action List for Future Meetings

- Employee Association topics
- Policy manual updates (ongoing)
- Update on driver incidents / training

ADJOURNMENT: 5:55 p.m.

Attest:

DRAFT UNTIL APPROVED

John Covington, Chairman
to the Personnel Committee of the Beaumont-Cherry Valley Water District



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
July 15, 2025**

Item 5

HUMAN RESOURCES REPORT

TO: Personnel Committee
FROM: Ren Berioso, Human Resources and Risk Manager
SUBJECT: Human Resources Report for the Month of June 2025

Table 1: Personnel

The table below represents the District's current Workforce.

June 30, 2025

Total Current Employees (Excluding Board Members)	48
Full-Time Employees	45
Part-Time	1
Temporary	2
Interns	0
Separations	0
Retired Employee(s)	0

Table 2: New Hires

The table below represents new hires.

June 30, 2025

Employee Name	Job Title	Department
None		

Table 3: Anniversaries*

The table below represents BCVWD employee anniversaries.

June 30, 2025

Employee Name	Department	Years of Service
Mike Morales	Operations	24 years
Bill Clayton	Finance and Administration	10 years
Sandra Flores	Finance and Administration	8 years
Erica Gonzales	Finance and Administration	7 years
Ericka Enriquez	Finance and Administration	4 years
Luis Lomeli	Operations	3 years
Jaden Schuler	Operations	2 years

**Work Anniversaries for the purposes of this report are calculated from the hire date and do not determine employment conditions or terms. This report does not include elected officials.*



Table 4: Promotions or Division/Title Change

The table below represents promotions or Division/Title Changes.

As of June 30, 2025

Employee Name	Former Title	Changed to
None		

Table 5: Recruitment

The table below represents active/closed recruitment(s).

As of June 30, 2025

Position	Department	Update
Engineering Intern	Engineering	Interviews on-going

Tables 6 to 8: Separation/Retirement

Table 6 below represents employees separating from BCVWD.

As of June 30, 2025

Employee Name	Position Held	Department	Last Day
None			

Table 7 below represents the monthly and year-to-date Turnover Rate comparing 2024 and 2025

Turnover Rate as of June 30, 2025	0%	No Separation for this month
2025 Turnover Rate Year-to-Date	6.19%	3 Separations as of June 30, 2025
Turnover Rate as of June 30, 2024	0%	No Separation for this month
2024 Turnover Rate Year-to-Date	6.74%	3 Separations as of June 30, 2024

Table 8 below shows the year-to-date turnover rate of the District in comparison to other Water Districts as of June 30, 2025:

Agency Name	% Turn-Over Rate	Year-To-Date Number of Separations	Current Number of Employees
Desert Water Agency	15.21%	8	92
Beaumont-Cherry Valley Water District	6.19%	3	48
Mission Springs Water District	5.71%	3	54
Hi-Desert Water District	4%	2	49
Cucamonga Valley Water District	3.10%	4	127
Lake Hemet Municipal Water District	0%	0	50
Yucaipa Valley Water District	0%	0	75

**Turnover Rates include voluntary and involuntary separations for both regular and temporary employees for all the comparable agencies.*



Table 9: Communications

The table below represents HR communications to BCVWD employees.

June 30, 2025

Communication	Topic
HR Memo 25-017 BCVWD Summer BBQ Event — June 26, 2025	Engagement
HR Memo 25-018 Exclusive Gym Membership Discounts for BCVWD Staff	Benefits
HR Memo 25-019 Your Feedback Matters – 2025 Great Place To Work (GPTW) Annual Engagement Survey	Engagement
HR Memo 25-020 Independence Day Holiday Closure and Holiday Pay Reminder	Holiday

Staff Report Prepared by Ren Berioso, Human Resources and Risk Manager



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 6a

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions for Policy 3000 Employee Status

Staff Recommendation

Approve the revision of Policy 3000 Employee Status to move forward to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff proposes revisions to Policy 3000 Employee Status to update and refine policy language, ensure alignment with current District practices, and reflect relevant contemporary developments influencing employment status at the District. The proposed updates clarify definitions, probationary procedures, and employment classifications. These revisions were reviewed by District Legal Counsel to ensure consistency with applicable employment laws and to preserve the “at-will” doctrine where appropriate.

Background

At the October 13, 2021 Regular Board Meeting, the Board of Directors adopted revisions to Policy Number 3000 Employee Status, via Resolution 2021-18 that replaced Part 1, Section 8.

Policy 3000 Employee Status establishes the foundational definitions and classifications that govern the employment relationship at Beaumont-Cherry Valley Water District. Since its last revision in 2021, District operations have evolved significantly, including changes in internal mobility, role classifications, and the use of part-time and temporary employees. As such, a policy refresh is necessary to ensure consistency between written procedures and actual District practices. The revised policy provides clarified definitions for employment types, outlines updated probationary procedures, and reinforces performance expectations for new, promoted, reclassified, and temporary employees. These updates promote fairness, transparency, and consistent administration of personnel actions across the District.

The revisions also strengthen the policy’s legal footing by incorporating recommendations from District Legal Counsel to align with current California labor laws, CalPERS restrictions, and the District’s Memorandums of Understanding (MOUs). The changes help preserve the “at-will” employment status while eliminating ambiguities that could lead to inconsistent interpretations or risk exposure. By refining policy language and integrating legal and operational best practices, the District ensures improved clarity for employees and supervisors, reduces the potential for grievances or misapplication, and reinforces accountability in the management of human resources. This policy update is a proactive step in maintaining a compliant, adaptable, and well-governed workforce framework.



Discussion

Table A, Summary of Policy Changes, outlines the proposed changes to the current Employee Status (policy) that are in reference to the redlined draft version attached herewith.

Table A – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact
1	Entire Policy Sections	None	The District utilizes “Probationary” over “Introductory”	Changed all the “Introductory” words to “Probationary”	No fiscal impact.
2	Section 3000.3	None	Not Applicable	Placed a section title to serve as a guide for policy readers.	No fiscal impact.
3	Section 3000.3.1	None	Newly Hired and Rehired undergo a probationary period at the District.	Revised the section to provide guidance for newly hired and rehired employees.	No fiscal impact.
4	Section 3000.4	None	Not Applicable	Stricken out and moved this section to combine with Section 3000.3.5	No fiscal impact.
5	Section 3000.5	None	Employees whose positions are reclassified undergo a probationary period of 6 months. For promoted employees, a PIP is given if the employee does not meet the standards of the job while under probationary period.	Revised this section to reflect current District practice.	No fiscal impact.
6	No Section	None	The District has the same policy that covers transferred or voluntary demoted employees.	Add Section 3000.3.3 and reference Policy 3176.	No fiscal impact.
7	No Section	None	The reclassified employees will still undergo probationary period as the current practice.	Add section 3000.3.4	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact
8	Section 3000.6	None	All probationary employees undergo evaluation at the conclusion of the period. There is no merit increase as the current practice.	Moved parts of Section 3000.4 and combined this with new Section 3000.3.5	No fiscal impact.
9	Section 3000.7	PEMHCA	The District follows the law.	Now Section 3000.4: Legal Counsel added a language "to meet all the requirements of PEMHCA for working after retirement.	No fiscal impact.
10	Section 3000.7.1	None	The District does not hire a temporary, part-time employee.	Stricken out this section.	No fiscal impact.
11	Section 3000.8	SB 616	The District follows the law.	New Section 3000.6.B. Referenced Policy 3085 for the new law.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the revision of this policy.

Attachment/s

1. Redlined version Policy Number 3000 Employee Status
2. Side-by-Side version Policy Number 3000 Employee Status
3. Cleaned version Policy Number 3000 Employee Status

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

PERSONNEL

POLICY TITLE: EMPLOYEE STATUS
POLICY NUMBER: 3000

3000.1 At Will. All employment at the District is “at will.” This means that either the employee or the District may end the employment relationship at any time, with or without advance notice and with or without cause. Provided, however, that discipline, grievance, layoff, and other similar procedures in a Memorandum of Understanding (MOU) or written employment agreement will apply while in force, but are not intended to alter the at-will nature of the employment relationship. The at-will nature of the employment relationship can only be changed by a clear and unambiguous intent to alter the at-will nature of employment made in an MOU or written employment agreement approved by the District Board and signed by or on behalf of the employee involved. Any reference in this Manual to discipline is not intended to change the at-will nature of the employment relationship or to restrict either the employee’s or the District’s options under the “at-will” employment policy.

3000.2 Regular Full-Time Employee. A “Regular” employee is one who has been hired to fill a regular position in any job classification and has completed their ~~introductory~~ probationary period except as otherwise required by law. Full-Time Employment is defined as a 40-hour average workweek. Regular employees are compensated according to the District Salary Schedule as approved by the Board of Directors. Regular, Full-Time Employees will be eligible for benefits in accordance with their classification and employee group.

Commented [BR(1): To be in alignment with the previously approved policies, staff changed the language from “Introductory” to “Probationary” as this is used profoundly in the public agency setting.

3000.3 Probationary Periods

3003.3.1 ~~Introductory~~ Newly Hired and Rehired Employees. All newly hired ~~and rehired~~ employees serve a ~~probationary~~ introductory period ~~for the first six (6) months from hire or rehire date.~~ The ~~introductory~~ probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The District uses this period to evaluate employee capabilities, work habits, and overall performance. Either the employee or the District may end the employment relationship at will at any time during or after the ~~introductory~~ probationary period, with or without cause or advance notice. All newly hired and ~~(including rehired)~~ employees work on an ~~introductory~~ probationary basis for the first 6 months after their date of hire ~~or rehire~~. Any ~~unauthorized~~ significant absence will automatically extend an ~~introductory~~ probationary period by the length of the ~~unauthorized~~ absence. If the District determines that the designated ~~probationary~~ introductory period does not allow sufficient time to thoroughly evaluate the employee’s performance, the ~~introductory~~ probationary period may be extended one time for a total of up to 12 months at the discretion of the General Manager or their ~~his/her~~ designee.

~~3000.4 Upon successful completion of the introductory period, full-time employees enter the “regular” employment classification. Successful completion of the introductory period does not guarantee employment for any specific duration or change the at-will status of regular employment.~~

Commented [BR(2): Relocated to Section 3000.3.5

3000.3.2.5 Promoted Employees. Current employees who are promoted ~~or transferred~~ to a new classification will serve an ~~introductory~~ probationary period for the first ~~six (6) months from after his/her their effective date of appointment.~~ ~~Employees who are reclassified will not serve an introductory period for an updated job title.~~ In the event that a promoted ~~or transferred~~ employee is not able to satisfactorily complete their ~~his/her~~ introductory probationary period in the new role, ~~they he/she~~ may resume their ~~his/her~~ former position if it is ~~available~~ available, ~~needed or budgeted within the current fiscal year~~ vacant. However, the District reserves the right to fill vacant positions, and the option to resume a former position is not guaranteed. If the ~~former~~ position is not available,

Commented [BR(3): This was removed as this is not currently the District’s practice.

Adopted by Resolution 21-018, 10/13/2021

the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary. ~~the introductory period may be extended at the discretion of the General Manager or their designee, or the employee may be terminated from employment. Additionally, if the employee is not able to satisfactorily complete their introductory period due to violation(s) of policy, they will not be eligible to resume their former position, and may experience disciplinary action, up to and including termination of employment.~~

Commented [BR(4)]: Revised this section to align with other sections' provisions.

3000.3.3 Transferred and/or Voluntary Demoted Employees. See Policy 3176 for more information.

3000.3.4 Reclassified Position. Current employees whose position is reclassified will serve a probationary period for the first six (6) months from the effective date of position reclassification. In the event that a promoted employee is not able to satisfactorily complete his/her probationary period in the reclassified role, the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary.

Commented [BR(5)]: Added to provide section for employees under reclassified positions

3000.3.5~~6~~ Introductory-Probationary Evaluation. At the conclusion of the ~~introductory-probationary~~ period, employees will receive a performance evaluation from their supervisor to assess whether the ~~introductory probationary~~ period is successfully completed. Upon successful completion of the probationary period, full-time employees enter the "regular" employment classification. Successful completion of the probationary period does not guarantee employment for any specific duration or change the at-will status of regular employment. The completion of the ~~introductory-probationary~~ period is not eligible for a merit increase. (See Policy 3010 Employee Performance Evaluation and Procedure.)

3000.4~~7~~ Temporary Employee. A temporary employee is defined as anyone hired for a period of 6 months or less. Employees hired to replace a regular employee who is on a leave of absence shall be hired as temporary employees. Temporary Employees may not work more than 1,000 hours or 125 days in a CalPERS fiscal year (July 1-June 30). Retired Annuitants from CalPERS may not work in excess of 960 hours in a CalPERS fiscal year, and must otherwise meet all of the requirements for working after retirement.

1. ~~Part Time, Temporary Employee. A temporary employee working less than 40 hours per week on average in a temporary position is a Part Time, Temporary Employee. Part Time, Temporary Employees may work in their positions for up to 12 months but may not work in excess of 1,000 hours (960 hours for Retired Annuitants) in a CalPERS fiscal year (July 1-June 30).~~

Commented [BR(6)]: The District does not hire a part-time, temporary employee.

3000.5~~8~~ Part-Time Employee. A "Part-time" employee is one who is hired to work within any job classification, but whose position is not regular in nature. The part-time employee works whenever the District's workload increases to a level that a regular employee cannot accommodate or when other factors make part-time employment advantageous. On average, part-time employees may not work more than 20 hours per week. They may also work standby as discussed in Policy 3055 if required by their job classification.

3000.6 Benefits for Temporary and Part-Time Employees.

1. A temporary or part-time employee will not be eligible for fringe benefits including holiday pay, vacation pay, jury duty pay, health insurance coverage, bereavement pay, ~~or items of a similar nature, nor will they he/she accrue~~ seniority or leave of absence rights, except where required by law. Temporary or Part-Time employees are eligible for the Employee Assistance Program

Commented [RTG7]: This would depend on their hours and length of employment.

Commented [BR(8R7)]: Policy Section 3000.4 States that Temp Employees cannot go beyond 6 months/1,000 hours so no need to follow the law regarding health insurance coverage.

Adopted by Resolution 21-018, 10/13/2021

(EAP), standard life insurance, standard Accidental Death & Dismemberment (AD&D) insurance, and may be eligible to purchase dental and vision insurance or ancillary benefits at their own discretion option and cost expense.

2. In accordance with the California Labor Code, a temporary or part-time employee will accrue paid sick leave as of the first day of employment at a rate of 1 hour for every 30 hours worked provided that the employee has worked for 30 or more days within a year from the beginning of employment. The temporary or part-time employee will be eligible to take paid sick leave after the 90th day of employment. The employee shall be limited to an annual accrued sick leave limit of 24 hours annually. For Paid Sick Leave accrual provisions for temporary and part-time employees, please refer to Policy 3085 for more information.

Commented [BR(9): This is stricken out due to the new CA Sick Leave Law effective 1/1/2024. The provisions of the new law is covered by Policy 3085 Sick Leave

Adopted by Resolution 21-018, 10/13/2021

CURRENT POLICY

POLICY TITLE: EMPLOYEE STATUS
POLICY NUMBER: 3000

3000.1 **At Will.** All employment at the District is "at will." This means that either the employee or the District may end the employment relationship at any time, with or without advance notice and with or without cause. Provided, however, that discipline, grievance, layoff, and other similar procedures in a Memorandum of Understanding (MOU) or written employment agreement will apply while in force, but are not intended to alter the at-will nature of the employment relationship. The at-will nature of the employment relationship can only be changed by a clear and unambiguous intent to alter the at-will nature of employment made in an MOU or written employment agreement approved by the District Board and signed by or on behalf of the employee involved. Any reference in this Manual to discipline is not intended to change the at-will nature of the employment relationship or to restrict either the employee's or the District's options under the "at-will" employment policy.

3000.2 **Regular Full-Time Employee.** A "Regular" employee is one who has been hired to fill a regular position in any job classification and has completed their introductory period except as otherwise required by law. Full-Time Employment is defined as a 40-hour average workweek. Regular employees are compensated according to the District Salary Schedule as approved by the Board of Directors. Regular, Full-Time Employees will be eligible for benefits in accordance with their classification and employee group.

3000.3 **Introductory Employee.** All newly hired employees serve an introductory period. The introductory period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The District uses this period to evaluate employee capabilities, work habits, and overall performance. Either the employee or the District may end the employment relationship at will at any time during or after the introductory period, with or without cause or advance notice. All new (including rehired) employees work on an introductory basis for the first 6 months after their date of hire. Any significant absence will automatically extend an introductory period by the length of the absence. If the District determines that the designated introductory period does not allow sufficient time to thoroughly evaluate the employee's performance, the introductory period may be extended one time for a total of up to 12 months at the discretion of the General Manager or their designee.

3000.4 Upon successful completion of the introductory period, full-time employees enter the "regular" employment classification. Successful completion of the introductory period does not guarantee employment for any specific duration or change the at-will status of regular employment.

3000.5 Current employees who are promoted or transferred to a new classification will serve an introductory period for the first 6 months after their date of appointment. Employees who are reclassified will not serve an introductory period for an updated job title. In the event that a promoted or transferred employee is not able to satisfactorily complete their introductory period in the new role, they may resume their former position if it is vacant. However, the District reserves the right to fill vacant positions, and the option to resume a former position is not guaranteed. If the position is not available, the introductory period may be extended at the discretion of the General Manager or their designee, or the employee may be terminated from employment. Additionally, if the employee is not able to satisfactorily complete their introductory period due to violation(s) of policy, they will not be eligible to resume their former position, and may experience disciplinary action, up to and including termination of employment.

3000.6 **Introductory Evaluation.** At the conclusion of the introductory period, employees will receive a performance evaluation to assess whether the introductory period is successfully completed. The introductory period

PROPOSED POLICY

POLICY TITLE: EMPLOYEE STATUS
POLICY NUMBER: 3000

3000.1 **At Will.** All employment at the District is "at will." This means that either the employee or the District may end the employment relationship at any time, with or without advance notice and with or without cause. Provided, however, that discipline, grievance, layoff, and other similar procedures in a Memorandum of Understanding (MOU) or written employment agreement will apply while in force, but are not intended to alter the at-will nature of the employment relationship. The at-will nature of the employment relationship can only be changed by a clear and unambiguous intent to alter the at-will nature of employment made in an MOU or written employment agreement approved by the District Board and signed by or on behalf of the employee involved. Any reference in this Manual to discipline is not intended to change the at-will nature of the employment relationship or to restrict either the employee's or the District's options under the "at-will" employment policy.

3000.2 **Regular Full-Time Employee.** A "Regular" employee is one who has been hired to fill a regular position in any job classification and has completed their ~~introductory~~ probationary period except as otherwise required by law. Full-Time Employment is defined as a 40-hour average workweek. Regular employees are compensated according to the District Salary Schedule as approved by the Board of Directors. Regular, Full-Time Employees will be eligible for benefits in accordance with their classification and employee group.

3000.3 **Probationary Periods**

3000.3.1 Introductory-Newly Hired and Rehired Employees. All newly hired ~~and rehired~~ employees serve a ~~probationary~~ probationary period ~~for the first six (6) months from hire or rehire date.~~ The ~~introductory~~ probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The District uses this period to evaluate employee capabilities, work habits, and overall performance. Either the employee or the District may end the employment relationship at will at any time during or after the ~~introductory~~ probationary period, with or without cause or advance notice. All newly hired ~~and~~ and ~~rehired~~ employees work on an ~~introductory~~ probationary basis for the first 6 months after their date of hire ~~or rehire.~~ Any ~~unauthorized~~ significant absence will automatically extend an ~~introductory~~ probationary period by the length of the ~~unauthorized~~ absence. If the District determines that the designated ~~probationary~~ probationary period does not allow sufficient time to thoroughly evaluate the employee's performance, the ~~introductory~~ probationary period may be extended one time for a total of up to 12 months at the discretion of the General Manager or ~~their~~ his/her designee.

3000.4 ~~Upon successful completion of the introductory period, full-time employees enter the "regular" employment classification. Successful completion of the introductory period does not guarantee employment for any specific duration or change the at-will status of regular employment.~~

3000.3.2 Promoted Employees. Current employees who are promoted or transferred to a new classification will serve an ~~introductory~~ probationary period for the first ~~six (6) months from after their effective date of appointment.~~ six (6) months from after his/her effective date of appointment. ~~Employees who are reclassified will not serve an introductory period for an updated job title. In the event that a promoted or transferred employee is not able to satisfactorily complete their introductory period in the new role, they may resume their former position if it is available, needed or budgeted within the current fiscal year.~~ Employees who are reclassified will not serve an introductory period for an updated job title. In the event that a promoted or transferred employee is not able to satisfactorily complete their introductory probationary period in the new role, they may resume their former position if it is available, needed or budgeted within the current fiscal year. However, the District reserves the right to fill vacant positions, and the option to resume a former position is not guaranteed. If the ~~former~~ former position is not available, ~~the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary.~~ the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary. ~~the introductory period may be~~

is not eligible for a merit increase. See Policy 3010 Employee Performance Evaluation and Procedure.

3000.7 Temporary Employee. A temporary employee is defined as anyone hired for a period of 6 months or less. Employees hired to replace a regular employee who is on a leave of absence shall be hired as temporary employees. Temporary Employees may not work more than 1,000 hours or 125 days in a CalPERS fiscal year (July 1-June 30). Retired Annuitants from CalPERS may not work in excess of 960 hours in a CalPERS fiscal year.

1. Part-Time, Temporary Employee. A temporary employee working less than 40 hours per week on average in a temporary position is a Part-Time, Temporary Employee. Part-Time, Temporary Employees may work in their positions for up to 12 months but may not work in excess of 1,000 hours (960 hours for Retired Annuitants) in a CalPERS fiscal year (July 1-June 30).

3000.8 Part-Time Employee. A "Part-time" employee is one who is hired to work within any job classification, but whose position is not regular in nature. The part-time employee works whenever the District's workload increases to a level that a regular employee cannot accommodate or when other factors make part-time employment advantageous. On average, part-time employees may not work more than 20 hours per week. They may also work standby as discussed in Policy 3055 if required by their job classification.

1. A temporary or part-time employee will not be eligible for fringe benefits including holiday pay, vacation pay, jury duty pay, health insurance coverage, bereavement pay, or items of a similar nature, nor will they accrue seniority or leave of absence rights except where required by law. Temporary or Part-Time employees are eligible for the Employee Assistance Program (EAP), standard life insurance, standard Accidental Death & Dismemberment (AD&D) insurance, and may be eligible to purchase dental and vision insurance or ancillary benefits at their own option and cost.
2. In accordance with the California Labor Code, a temporary or part-time employee will accrue paid sick leave as of the first day of employment at a rate of 1 hour for every 30 hours worked provided that the employee has worked for 30 or more days within a year from the beginning of employment. The temporary or part-time employee will be eligible to take paid sick leave after the 30th day of employment. The employee shall be limited to an annual accrued sick leave limit of 24 hours annually.

extended at the discretion of the General Manager or their designee, or the employee may be terminated from employment. Additionally, if the employee is not able to satisfactorily complete their introductory period due to violation(s) of policy, they will not be eligible to resume their former position, and may experience disciplinary action, up to and including termination of employment.

3000.3.3 Transferred and/or Voluntary Demoted Employees. See Policy 3176 for more information.

3000.3.4 Reclassified Position. Current employees whose position is reclassified will serve a probationary period for the first six (6) months from the effective date of position reclassification. In the event that a promoted employee is not able to satisfactorily complete his/her probationary period in the reclassified role, the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary.

3000.3.5 Introductory-Probationary Evaluation. At the conclusion of the introductory-probationary period, employees will receive a performance evaluation from their supervisor to assess whether the introductory-probationary period is successfully completed. Upon successful completion of the probationary period, full-time employees enter the "regular" employment classification. Successful completion of the probationary period does not guarantee employment for any specific duration or change the at-will status of regular employment. The completion of the introductory-probationary period is not eligible for a merit increase. (See Policy 3010 Employee Performance Evaluation and Procedure.)

3000.47 Temporary Employee. A temporary employee is defined as anyone hired for a period of 6 months or less. Employees hired to replace a regular employee who is on a leave of absence shall be hired as temporary employees. Temporary Employees may not work more than 1,000 hours or 125 days in a CalPERS fiscal year (July 1-June 30). Retired Annuitants from CalPERS may not work in excess of 960 hours in a CalPERS fiscal year, and must otherwise meet all of the requirements for working after retirement.

1. ~~Part-Time, Temporary Employee. A temporary employee working less than 40 hours per week on average in a temporary position is a Part-Time, Temporary Employee. Part-Time, Temporary Employees may work in their positions for up to 12 months but may not work in excess of 1,000 hours (960 hours for Retired Annuitants) in a CalPERS fiscal year (July 1-June 30).~~

3000.53 Part-Time Employee. A "Part-time" employee is one who is hired to work within any job classification, but whose position is not regular in nature. The part-time employee works whenever the District's workload increases to a level that a regular employee cannot accommodate or when other factors make part-time employment advantageous. On average, part-time employees may not work more than 20 hours per week. They may also work standby as discussed in Policy 3055 if required by their job classification.

3000.6 Benefits for Temporary and Part-Time Employees.

1. ~~A temporary or part-time employee will not be eligible for fringe benefits including holiday pay, vacation pay, jury duty pay, health insurance coverage, bereavement pay, or items of a similar nature, nor will they be eligible to accrue seniority or leave of absence rights, except where required by law. Temporary or Part-Time employees are eligible for the Employee Assistance Program (EAP), standard life insurance, standard Accidental Death & Dismemberment (AD&D) insurance, and may be eligible to purchase dental and vision insurance or ancillary benefits at their own discretion, option and expense.~~

2. ~~In accordance with the California Labor Code, a temporary or part-time employee will accrue paid sick leave as of the first day of employment at a rate of 1 hour for every 30 hours worked provided that the employee has worked for 30 or more days within a year from the beginning of employment. The temporary or part-time employee will be eligible to take paid sick leave after the 30th day of employment. The employee shall be limited to an annual accrued sick leave limit of 24 hours annually. For Paid Sick Leave accrual provisions for temporary and part-time employees, please refer to Policy 3085 for more information.~~

POLICY TITLE: EMPLOYEE STATUS
POLICY NUMBER: 3000

3000.1 At Will. All employment at the District is “at will.” This means that either the employee or the District may end the employment relationship at any time, with or without advance notice and with or without cause. Provided, however, that discipline, grievance, layoff, and other similar procedures in a Memorandum of Understanding (MOU) or written employment agreement will apply while in force, but are not intended to alter the at-will nature of the employment relationship. The at-will nature of the employment relationship can only be changed by a clear and unambiguous intent to alter the at-will nature of employment made in an MOU or written employment agreement approved by the District Board and signed by or on behalf of the employee involved. Any reference in this Manual to discipline is not intended to change the at-will nature of the employment relationship or to restrict either the employee’s or the District’s options under the “at-will” employment policy.

3000.2 Regular, Full-Time Employee. A “Regular” employee is one who has been hired to fill a regular position in any job classification and has completed their probationary period except as otherwise required by law. Full-Time Employment is defined as a 40-hour average workweek. Regular employees are compensated according to the District Salary Schedule as approved by the Board of Directors. Regular, Full-Time Employees will be eligible for benefits in accordance with their classification and employee group.

3000.3 Probationary Periods

3003.3.1 Newly Hired and Rehired Employees. All newly hired and rehired employees serve a probationary period for the first six (6) months from hire or rehire date. The probationary period is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The District uses this period to evaluate employee capabilities, work habits, and overall performance. Either the employee or the District may end the employment relationship at will at any time during or after the probationary period, with or without cause or advance notice. All newly hired and rehired employees work on a probationary basis for the first 6 months after their date of hire or rehire. Any unauthorized absence will automatically extend a probationary period by the length of the unauthorized absence. If the District determines that the designated probationary period does not allow sufficient time to thoroughly evaluate the employee’s performance, the probationary period may be extended one time for a total of up to 12 months at the discretion of the General Manager or his/her designee.

3000.3.2 Promoted Employees. Current employees who are promoted to a new classification will serve a probationary period for the first six (6) months from his/her effective date of appointment. In the event that a promoted employee is not able to satisfactorily complete his/her probationary period in the new role, he/she may resume his/her former position if it is available, needed or budgeted within the current fiscal year. However, the District reserves the right to fill vacant positions, and the option to resume a former position is not guaranteed. If the former position is not available, the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary.

3000.3.3 Transferred and/or Voluntary Demoted Employees. See Policy 3176 for more information.

3000.3.4 Reclassified Position. Current employees whose position is reclassified will serve a probationary period for the first six (6) months from the effective date of position reclassification. In the event that a

promoted employee is not able to satisfactorily complete his/her probationary period in the reclassified role, the employee may be placed on a Performance Improvement Plan (PIP) for no more than six (6) months, subjected to progressive corrective action, up to and including termination of employment if necessary.

3000.3.5 Probationary Evaluation. At the conclusion of the probationary period, employees will receive a performance evaluation from their supervisor to assess whether the probationary period is successfully completed. Upon successful completion of the probationary period, full-time employees enter the "regular" employment classification. Successful completion of the probationary period does not guarantee employment for any specific duration or change the at-will status of regular employment. The completion of the probationary period is not eligible for a merit increase. (See Policy 3010)

3000.4 Temporary Employee. A temporary employee is defined as anyone hired for a period of 6 months or less. Employees hired to replace a regular employee who is on a leave of absence shall be hired as temporary employees. Temporary Employees may not work more than 1,000 hours or 125 days in a CalPERS fiscal year (July 1-June 30). Retired Annuitants from CalPERS may not work in excess of 960 hours in a CalPERS fiscal year, and must otherwise meet all of the requirements for working after retirement.

3000.5 Part-Time Employee. A "Part-time" employee is one who is hired to work within any job classification, but whose position is not regular in nature. The part-time employee works whenever the District's workload increases to a level that a regular employee cannot accommodate or when other factors make part-time employment advantageous. On average, part-time employees may not work more than 20 hours per week. They may also work standby as discussed in Policy 3055 if required by their job classification.

3000.6 Benefits for Temporary and Part-Time Employees.

- A. A temporary or part-time employee will not be eligible for fringe benefits including holiday pay, vacation pay, jury duty pay, health insurance coverage, bereavement pay, items of a similar nature, or seniority or leave of absence rights, except where required by law. Temporary or Part-Time employees are eligible for the Employee Assistance Program (EAP), standard life insurance, standard Accidental Death & Dismemberment (AD&D) insurance, and may be eligible to purchase dental and vision insurance or ancillary benefits at their own discretion and expense.
- B. For Paid Sick Leave accrual provisions for temporary and part-time employees, please refer to Policy 3085 for more information.



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 6b

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions for Policy 3005 Compensation

Staff Recommendation

Approve the revision of Policy 3005 Compensation to move forward to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing revisions to Policy 3005 Compensation to improve clarity, incorporate current District practices, and ensure compliance with applicable labor regulations. The proposed changes formalize the General Manager's authority regarding compensation matters, with layered concurrence from Human Resources for policy compliance and equity, and the Director of Finance and Administration for budget oversight. These updates were reviewed by District Legal Counsel to confirm legal sufficiency and alignment with California labor laws.

Background

At the October 13, 2021 Regular Board Meeting, the Board of Directors adopted Policy Number 3005 Compensation through Resolution No. 2021-18 that replaced Part 1, Section 9. While the current policy provided direction on specific compensation-related matters, several areas required clarification and more robust guidance for staff, supervisors, and the General Manager. In particular, the revised policy addresses the proper channels and concurrence required for compensation decisions, reinforcing procedural transparency and fiscal accountability.

This policy is critical in upholding the District's values of fairness, transparency, and fiscal stewardship. It affirms the District's commitment to equitable compensation practices, ensures adherence to applicable state and federal employment laws, and strengthens internal controls over personnel-related financial decisions. Furthermore, it minimizes legal and financial risk exposure while enhancing organizational accountability and staff understanding of compensation-related procedures. The revised structure supports more informed decision-making and protects the District's operational integrity.

Human Resources' partnership with Legal Counsel was essential in reviewing and revising this policy to ensure alignment with California labor laws, District employment practices, and public agency standards. The legal review focused on mitigating risk, ensuring legal clarity, and preventing misinterpretation. This vetting helps protect the District from potential liability and supports consistent, compliant compensation practices.



Discussion

Table A, Summary of Policy Changes, outlines the proposed changes to the current Compensation (policy) that are in reference to the redlined draft version attached herewith.

Table 1 – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
1	Entire Policy Sections	None	The District utilizes “Probationary” over “Introductory”	Changed all the “Introductory” words to “Probationary”	No fiscal impact.
2	Section 3005.2.A	None	In alignment with Policy 3215 and the District’s practice, Human Resources and the Director of Finance and Administration signs the PAF before the final approval signature of the General Manager for compensation of new hires.	Included this revision/language in the policy.	No fiscal impact.
3	Section 3005.7	None	For annual performance evaluations, the employee is eligible for the advancement in next step of the salary range provided the result of the review is satisfactory. Also added transition to “Regular” status and position reclassification as basis of annual reviews.	Relocated and renumbered this section as 3005.3 and added the language to reflect current District practice.	No fiscal impact.



TABLE 1	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
4	Section 3005.4	None	The District posts the job vacancies both internally and externally though the hiring manager may prefer an internal candidate.	Stricken out the language “elect to recruit internally”.	No fiscal impact.
5	Section 3000.8	None	The General Manager or his/her designee has the sole authority to approve any form of compensation for various circumstances.	New section added to clarify the exclusive authority of the General Manager or designee to approve compensation in various situations with required justification, policy concurrence by Human Resources, fiscal oversight by the Director of Finance	No fiscal impact.

Fiscal Impact

Although the revised policy addresses compensation-related matters, there is no fiscal impact, as the added language and sections do not create new categories of pay or automatically trigger additional compensation. Instead, the revisions focus on clarifying existing procedures, reinforcing approval protocols, and ensuring alignment with current practices and budget oversight.

Attachment/s

1. Redlined version Policy Number 3005 Compensation
2. Side-by-Side version Policy Number 3005 Compensation
3. Cleaned version Policy Number 3005 Compensation

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

POLICY TITLE: COMPENSATION
POLICY NUMBER: 3005

3005.1 **Applicability.** ~~Compensation at Hiring.~~ This policy shall apply to all District employees.

3005.2 **New Employees.** All newly appointed employees shall be paid at the first step of the salary range for the position to which the employee is appointed except as provided in this policy. Changes to the salary schedule must be approved by the Board of Directors. Employees may request a copy of the salary schedule from Human Resources or from their supervisor, and the salary schedule ~~shall~~ **will** be ~~made~~ **made** available on the District website.

~~A. 3005.3~~ The General Manager, or ~~his/her~~ designee, may authorize a starting rate for a new employee at a higher step within the classification range based on a candidate's experience and eligibility, ~~and is supported by the Department Head's written justification and concurred with by Human Resources for policy compliance, and the Director of Finance and Administration for budget oversight.~~ This action shall be noted in the employment agreement or conditional offer letter, to be maintained in the employee's personnel file.

Commented [BR(1)]: These are currently being done at the District through the PAF.

~~3005.37~~ **Step Increases Based on Performance Evaluation.** Employees ~~who are below Step 5 within their classification salary range~~ shall be eligible for ~~advancement to the next step increases based on the results of their annual individual performance evaluation (See Policy 3010). Individual performance evaluations shall be conducted at 12-month intervals for all employees, based on anniversary date of either hire, transition to "Regular" status, transfer position reclassification or promotion to their current position. Employees are not eligible for increases upon after completing a 6-month probationary introductory period.~~

Commented [BR(2)]: District's practice is to advance to the next step of the salary range for satisfactory annual performance evaluation.

~~3005.4 Advancement within Range.~~ The General Manager shall authorize advancement within the salary range only after evaluating the employee's performance and determining that it is satisfactory. This determination shall be noted on a performance evaluation form to be placed in the employee's file, with a copy given to the employee (see Policy 3010).

Commented [BR(3)]: Created a new section per GM's direction.

3005.45 **Promotion.** When the District has an opening in a classification above the entry level, notice shall be posted in the break room(s), or similar employee notice areas for all work locations, prior to filling the position. The District may ~~elect to recruit internally only or~~ give preference to internal candidates, if desired. All candidates, whether internal or external, shall be evaluated equally with the most qualified candidate being selected for the position. Regular employees elevated in classification shall serve a ~~minimum 6-month probationary introductory~~ period in their newly acquired position. Regular status will be dependent on the job performance evaluation which will occur at the end of the ~~probationary introductory~~ period (see Policy 3000 ~~for more information 3-3000.6~~).

Commented [BR(4)]: Although posting jobs internally is not in violation of Federal and State laws, the District practice is to post the job both internal and external, with an option for hiring managers to give preference to internal candidates if desired.

3005.56 **Performing Work Out of Classification.** Employees required to work a normal shift in a temporary classification higher than their current classification will be paid a shift differential equivalent to 5% of their base pay rate. Should an employee be required to work temporarily in a classification paying less than their established rate, ~~he/she~~ **they** will be paid at ~~their his/her normal regular~~ rate. Employees may not perform work out of classification for longer than ~~six (6)~~ months.

~~3005.7~~ **Step Increases.** Employees below Step 5 in their classification shall be eligible for step increases based on their individual performance evaluation. Individual performance evaluations shall be conducted at 12-

BEAUMONT-CHERRY VALLEY WATER DISTRICT

~~month intervals for all employees, based on anniversary date of either hire, transfer, or promotion to their current position. Employees are not eligible for increases after completing a 6-month introductory period.~~

Commented [BR(5)]: Relocated and Renumbered as Section 3005.3

3005.68 **Overtime.** See Policy 3055 for more information.5.

3005.7 **Authority for Compensation Approval.** The General Manager or his/her designee has the sole authority to approve any form of compensation, including salary adjustments or differential pay. Such approval must be supported by a written justification from the Department Head and must be concurred with by Human Resources to ensure policy compliance and equity, and the Director of Finance and Administration to confirm budget availability. No compensation shall be granted without the final approval by the General Manager or his/her designee. The General Manager or his/her designee may also authorize advancement by more than one step within the salary range under certain circumstances, including but not limited to exceptional work performance, organizational need, market-related factors, or other justifiable reasons. While such decisions should generally be supported by performance evaluations and justification from the Department Head, the General Manager or his/her designee retains discretion to consider broader or extenuating factors. The same must be concurred with by Human Resources for policy compliance and equity, and the Director of Finance and Administration for budget oversight.

Commented [BR(6)]: Proposed section as reviewed by the General Manager. This section provides latitude for the General Manager for various circumstances.

Attachment 2

CURRENT POLICY

POLICY TITLE: COMPENSATION
POLICY NUMBER: 3005

3005.1 **Compensation at Hiring.** This policy shall apply to all District employees.

3005.2 **New Employees.** All newly appointed employees shall be paid at the first step of the salary range for the position to which the employee is appointed except as provided in this policy. Changes to the salary schedule must be approved by the Board of Directors. Employees may request a copy of the salary schedule from Human Resources or from their supervisor, and the salary schedule will be available on the District website.

3005.3 The General Manager, or their designee, may authorize a starting rate for a new employee at a higher step within the classification range based on a candidate's experience and eligibility. This action shall be noted in the employment agreement or conditional offer letter, to be maintained in the employee's personnel file.

3005.4 **Advancement within Range.** The General Manager shall authorize advancement within the salary range only after evaluating the employee's performance and determining that it is satisfactory. This determination shall be noted on a performance evaluation form to be placed in the employee's file, with a copy given to the employee (see Policy 3010).

3005.5 **Promotion.** When the District has an opening in a classification above the entry level, notice shall be posted in the break room(s), or similar employee notice areas for all work locations, prior to filling the position. The District may elect to recruit internally-only or give preference to internal candidates, if desired. All candidates, whether internal or external, shall be evaluated equally with the most qualified candidate being selected for the position. Regular employees elevated in classification shall serve a minimum 6-month introductory period in their newly acquired position. Regular status will be dependent on the job performance evaluation which will occur at the end of the introductory period (see Policy 3000.3-3000.6).

3005.6 **Performing Work Out of Classification.** Employees required to work a normal shift in a temporary classification higher than their current classification will be paid a shift differential equivalent to 5% of their base pay rate. Should an employee be required to work temporarily in a classification paying less than their established rate, they will be paid at their normal rate. Employees may not perform work out of classification for longer than 6 months.

3005.7 **Step Increases.** Employees below Step 5 in their classification shall be eligible for step increases based on their individual performance evaluation. Individual performance evaluations shall be conducted at 12-month intervals for all employees, based on anniversary date of either hire, transfer, or promotion to their current position. Employees are not eligible for increases after completing a 6-month introductory period.

3005.8 **Overtime.** See Policy 3055.5.

PROPOSED POLICY

POLICY TITLE: COMPENSATION
POLICY NUMBER: 3005

3005.1 **Applicability. Compensation at Hiring.** This policy shall apply to all District employees.

3005.2 **New Employees.** All newly appointed employees shall be paid at the first step of the salary range for the position to which the employee is appointed except as provided in this policy. Changes to the salary schedule must be approved by the Board of Directors. Employees may request a copy of the salary schedule from Human Resources or from their supervisor, and the salary schedule shall be made available on the District website.

A. ~~3005.3~~ The General Manager, or ~~his/her~~ designee, may authorize a starting rate for a new employee at a higher step within the classification range based on a candidate's experience and eligibility, and is supported by the Department Head's written justification and concurred with by Human Resources for policy compliance, and the Director of Finance and Administration for budget oversight. This action shall be noted in the employment agreement or conditional offer letter, to be maintained in the employee's personnel file.

3005.3 ~~7~~ **Step Increases Based on Performance Evaluation.** Employees who are below Step 5 within their classification salary range shall be eligible for advancement to the next step increases based on the results of their annual individual performance evaluation. (See Policy 3010). Individual performance evaluations shall be conducted at 12-month intervals for all employees, based on anniversary date of either hire, transition to "Regular" status, transfer position reclassification or promotion to their current position. Employees are not eligible for increases upon after completing a 6-month probationary introductory period.

~~3005.4 Advancement within Range.~~ The General Manager shall authorize advancement within the salary range only after evaluating the employee's performance and determining that it is satisfactory. This determination shall be noted on a performance evaluation form to be placed in the employee's file, with a copy given to the employee (see Policy 3010).

3005.4 ~~5~~ **Promotion.** When the District has an opening in a classification above the entry level, notice shall be posted in the break room(s), or similar employee notice areas for all work locations, prior to filling the position. The District may elect to recruit internally-only or give preference to internal candidates, if desired. All candidates, whether internal or external, shall be evaluated equally with the most qualified candidate being selected for the position. Regular employees elevated in classification shall serve a ~~minimum~~ 6-month ~~probationary introductory~~ period in their newly acquired position. Regular status will be dependent on the job performance evaluation which will occur at the end of the ~~probationary introductory~~ period (see Policy 3000.3-3000.6).

3005.5 ~~6~~ **Performing Work Out of Classification.** Employees required to work a normal shift in a temporary classification higher than their current classification will be paid a shift differential equivalent to 5% of their base pay rate. Should an employee be required to work temporarily in a classification paying less than their established rate, ~~he/she~~ they will be paid at ~~their~~ ~~his/her~~ normal ~~regular~~ rate. Employees may not perform work out of classification for longer than ~~six~~ (6) months.

3005.7 ~~Step Increases.~~ Employees below Step 5 in their classification shall be eligible for step increases based on their individual performance evaluation. Individual performance evaluations shall be conducted at 12-

~~month intervals for all employees, based on anniversary date of either hire, transfer, or promotion to their current position. Employees are not eligible for increases after completing a 6-month introductory period.~~

~~3005.68~~ **Overtime.** See Policy 3055 for more information.~~6.~~

~~3005.7 **Authority for Compensation Approval.** The General Manager or his/her designee has the sole authority to approve any form of compensation, including salary adjustments or differential pay. Such approval must be supported by a written justification from the Department Head and must be concurred with by both the Human Resources Department to ensure policy compliance and equity, and the Director of Finance and Administration to confirm budget availability. No compensation shall be granted without the final approval by the General Manager or his/her designee. The General Manager or his/her designee may also authorize advancement by more than one step within the salary range under certain circumstances, including but not limited to exceptional work performance, organizational need, market-related factors, or other justifiable reasons. While such decisions should generally be supported by performance evaluations and justification from the Department Head, the General Manager or his/her designee retains discretion to consider broader or extenuating factors. The same must be concurred with by Human Resources for policy compliance and equity, and the Director of Finance and Administration for budget oversight.~~

BEAUMONT-CHERRY VALLEY WATER DISTRICT

POLICY TITLE: COMPENSATION
POLICY NUMBER: 3005

3005.1 **Applicability.** This policy shall apply to all District employees.

3005.2 **New Employees.** All newly appointed employees shall be paid at the first step of the salary range for the position to which the employee is appointed except as provided in this policy. Changes to the salary schedule must be approved by the Board of Directors. Employees may request a copy of the salary schedule from Human Resources or from their supervisor, and the salary schedule shall be made available on the District website.

- A. The General Manager, or his/her designee, may authorize a starting rate for a new employee at a higher step within the classification range based on a candidate's experience and eligibility, and is supported by the Department Head's written justification and concurred with by Human Resources for policy compliance, and the Director of Finance and Administration for budget oversight. This action shall be noted in the employment agreement or conditional offer letter, to be maintained in the employee's personnel file.

3005.3 **Step Increases Based on Performance Evaluation.** Employees who are below Step 5 within their classification salary range shall be eligible for advancement to the next step based on the results of their annual individual performance evaluation (See Policy 3010). Individual performance evaluations shall be conducted at 12-month intervals for all employees, based on anniversary date of either hire, transition to "Regular" status, transfer, position reclassification or promotion to their current position. Employees are not eligible for increases upon completing a 6-month probationary period.

3005.4 **Promotion.** When the District has an opening in a classification above the entry level, notice shall be posted in the break room(s), or similar employee notice areas for all work locations, prior to filling the position. The District may give preference to internal candidates, if desired. All candidates, whether internal or external, shall be evaluated equally with the most qualified candidate being selected for the position. Regular employees elevated in classification shall serve a 6-month probationary period in their newly acquired position. Regular status will be dependent on the job performance evaluation which will occur at the end of the probationary period (see Policy 3000 for more information).

3005.5 **Performing Work Out of Classification.** Employees required to work a normal shift in a temporary classification higher than their current classification will be paid a shift differential equivalent to 5% of their base pay rate. Should an employee be required to work temporarily in a classification paying less than their established rate, he/she will be paid at his/her regular rate. Employees may not perform work out of classification for longer than six (6) months.

3005.6 **Overtime.** See Policy 3055 for more information

3005.7 **Authority for Compensation Approval.** The General Manager or his/her designee has the sole authority to approve any form of compensation, including salary adjustments or differential pay. Such approval must be supported by a written justification from the Department Head and must be concurred with by Human Resources to ensure policy compliance and equity, and the Director of Finance and Administration to confirm budget availability. No compensation shall be granted without the final approval by the General Manager or his/her designee. The General Manager or his/her designee may also authorize advancement by more than one step within the salary range under certain circumstances, including but not limited to exceptional work performance, organizational need, market-related factors, or other justifiable reasons. While such decisions should generally be supported by performance evaluations and justification from the Department Head, the General Manager or his/her designee retains discretion to consider broader or extenuating factors. The same must be concurred with by Human Resources for policy compliance and equity, and the Director of Finance and Administration for budget oversight.



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 6c

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

**SUBJECT: Policies and Procedures Manual Updates / Revisions for Policy 3010
Employee Performance Evaluation**

Staff Recommendation

Approve the revision of Policy 3010 Employee Performance Evaluation to move forward to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing revisions to Policy 3010 Employee Performance Evaluation to enhance language clarity, ensure alignment with current District practices, and reflect best practices observed in other public agencies. The revisions are also intended to establish a clear linkage between employee performance and compensation practices outlined in Policy 3005 Compensation. Key enhancements include structural refinements, expanded procedural guidance, and the addition of a "No Retaliation" section to reinforce a culture of open communication, fairness, and professional integrity. The proposed policy updates were reviewed by District Legal Counsel to ensure compliance with California labor laws and mitigate risks related to unfair labor practices or wrongful termination claims.

Background

At the October 13, 2021, Regular Board Meeting, the Board of Directors adopted Policy Number 3010 through Resolution No. 2021-17. The policy has since served as a framework for evaluating employee performance across the District.

While the policy has been functional in outlining the basic structure for annual performance evaluations, revisions were necessary to improve its clarity, consistency, and relevance to current practices. The updated language refines various sections to enhance readability and ensure that terminology is applied uniformly throughout the document. Additionally, the revisions align Policy 3010 with Policy 3005 Compensation, particularly with respect to the merit step eligibility process. This ensures consistency between performance evaluation outcomes and compensation decisions.

The policy has also been updated to reinforce current District practices, such as the structured use of probationary evaluations, interim evaluations, and performance improvement plans (PIPs), which support employee development and accountability. Furthermore, to better reflect industry standards and practices used by other public agencies, enhancements have been made to align with best practices in human resources administration. A new "No Retaliation" clause was also added to emphasize the District's commitment to fostering a culture of open communication, fairness, and professional integrity. This addition is designed to protect employees who participate



in the evaluation process, provide feedback, or exercise their rights to respond or appeal evaluation outcomes.

Human Resources staff conducted a review of comparable policies from other public agencies and engaged Legal Counsel to assess the revisions for legal compliance, transparency, and organizational integrity.

Discussion

Table A, Summary of Policy Changes, outlines the proposed changes to the current Employee Performance Evaluation (policy) that are in reference to the redlined draft version attached herewith.

Table A – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
1	Entire Policy Sections	None	Not applicable	Changed the language back to "Probationary"	No fiscal impact.
2	Section 3010.1	None	The District has also been considering completing job-specific requirements in the performance evaluation.	Added this language in this section.	No fiscal impact.
3	Section 3010.3	None	Human Resources is the designated entity to deliver the annual report to the Personnel Committee annually.	Revised this language in this section.	No fiscal impact.
4	Section 3010.4	None	The District has also been considering completing job-specific requirements in the performance evaluation.	Added this language in this section.	No fiscal impact.



TABLE 1	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
5	Section 3010.5	None	The Department Heads, in partnership with Human Resources provides comments on the review draft by the supervisor to ensure completeness.	Added this language in the section.	No fiscal impact.
6	Section 3010.5.A	None	Position reclassification also merits restarts the evaluation date as the essential functions have changed. The District has also been considering completing job-specific requirements in the performance evaluation.	Added these language in this policy subsection.	No fiscal impact
7	Section 3010.5.B	None	The District historically has extended the probationary period to a max of 12 months if approved by the General Manager if 6 months is not sufficient.	Besides refining the language, this revision was also added/	No fiscal impact.
8	Section 3010.5.C	None	The District has divisions operating under a Department.	Added this language in this subsection.	No fiscal impact.



TABLE 1	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
9	No Section	None	The District in the past placed non-performing employees on PIP which did not exceed 6 months.	Added this language in this section and renumbered this as new Section 3010.6.	No fiscal impact
10	No Section	Title VII of CRA of 1964 FEHA Labor Code § 6310 (Whistleblower Protection)	The District follows the law.	Added this non-retaliation policy to protect employees who participate in the review process, or provide feedback.	No fiscal impact

Fiscal Impact

There is no fiscal impact in the revision of this policy.

Attachments

1. Redlined version Policy Number 3010 Employee Performance Evaluation
2. Side-by-Side version Policy Number 3010 Employee Performance Evaluation
3. Cleaned version Policy Number 3010 Employee Performance Evaluation

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

PERSONNEL

POLICY TITLE: EMPLOYEE PERFORMANCE EVALUATION

POLICY NUMBER: 3010

3010.1 Purpose. To provide a means for discussing, planning, and reviewing the performance of an employee. Regular performance evaluations improve communication and employee engagement; help employees clearly define and understand their duties, ~~and responsibilities~~ and the requirements of the position; document accomplishments during the rating period; suggest areas in which employees can improve performance; provide information for career development and training; help set goals and expectations for the next rating period; and provide a basis for awarding merit or step increases.

Commented [BR(1)]: This was added to support the language in Section 3010.5.A as recommended by the General Manager.

3010.2 Policy. All full- and part-time regular employees shall have their job performance evaluated on an annual basis. This policy does not preclude the conduct of more frequent evaluations as needed to document significant changes in performance.

3010.3 Responsibilities. Each manager and supervisor is responsible for the timely assessment of the performance and contribution of their employees. Human Resources will coordinate, track, and report on the completion of annual performance evaluations; provide ~~annual~~ training to managers and supervisors on conducting effective performance evaluations as necessary; and will maintain a copy of each evaluation in the employee's official personnel file. Human Resources will provide an annual compliance report to the General Manager or his/her designee by January 31st for the prior calendar year, and ~~The General Manager~~ will share the statistical report (over all overall percentage of compliance) with the Personnel Committee of the Board of Directors.

3010.4 Standards. Each supervisor is responsible for developing a clear description of the duties, responsibilities, goals, and expectations for each position to be evaluated. The duties and responsibilities and position requirements must be consistent with the job description for each position. The goals and expectations should be aligned with the District's strategic goals, organizational development and mission. The goals and expectations shall be provided to the employee prior to being evaluated against them within the 12-month period following the performance evaluation.

Commented [BR(2)]: Added to serve as benchmark for goals.

3010.5 Preparation of Evaluations. All employees shall have their job performance evaluated by their immediate supervisor on an annual basis. Interim and/or ~~introductory~~ probationary period evaluations may be completed as necessary to effectively document employee performance. The Department Head and Human Resources will ~~shall~~ review and provide comments (as necessary) on the drafted evaluation before it is delivered to the employee in an evaluation conference. In the event that Human Resources, the Department Head and the supervisor cannot come to a consensus, the matter may be referred to the General Manager or his/her designee, ~~and/or to legal counsel.~~

A. Annual Evaluation. All employees will have their performance evaluated at the time of their anniversary date (of hire, rehire, promotion, position reclassification, transition to "Regular" status or transfer to their most recent position) with the District. The supervisor shall indicate on the Performance Evaluation Form when an eligible employee is recommended for a merit increase and sign the Personnel Action Form (See Policy Number 3215). If the employee receives a performance rating of "Meets Expectations" or higher, and continues to satisfy the essential qualifications of the position, including but not limited to maintaining any required licenses or certifications, adherence to safety standards, and any other job-specific requirements, here requirements, he/she shall be eligible for an increase to the next step within his/her salary range, provided his/her has not reached the maximum step of the range. ~~Employees receiving an overall rating of less than "Meets Expectations" Satisfactory are not eligible to~~

Commented [BR(3)]: Added reclassification of a position as this is currently the District's practice.

Commented [BR(4)]: Added this language per GM's recommendation to ensure staff members not only should have a satisfactory performance, but also to ensure that he/she satisfy the job qualifications as stated in the job description.

receive a merit increase. In no event shall a performance evaluation be considered disciplinary, regardless of the rating.

4.

- B. **Probationary/Introductory Evaluation.** ~~Introductory Performance~~ evaluations ~~shall~~ may be completed ~~during~~ upon the conclusion of the introductory probationary period (See Policy 3000). Upon successful completion of the ~~introductory probationary~~ period, employees shall transition to "Regular" status and receive an annual ~~performance~~ evaluations based on the date he/she attained "Regular" status at the time of the employee's anniversary date. The ~~introductory probationary~~ evaluation is the tool in which the immediate supervisor determines whether the ~~introductory probationary~~ employee has the skills and other qualifications needed to perform satisfactorily. The immediate supervisor shall indicate on the Performance Evaluation Form if the ~~introductory probationary~~ employee is recommended to pass the ~~introductory probationary~~ period, or if an extension of the ~~introductory probationary~~ period is necessary. An extension of the ~~introductory probationary~~ period must be approved by the General Manager or ~~his/her~~ their designee and. ~~The extension of the introductory period must be accompanied by a Performance Improvement Plan (PIP). The PIP should~~ shall run concurrently with the ~~extended probationary~~ extension period. If the District determines that the designated probationary period does not allow sufficient time to thoroughly evaluate the employee's performance, the probationary period may be extended one time for a total of up to twelve (12) months at the discretion of the General Manager or his/her designee. An overall ~~performance~~ rating of less than Unsatisfactory "Meets Expectations" at the conclusion of the PIP may result in lead to progressive corrective action, up to and including termination of employment.

Commented [BR(5)]: The same as the other policies, this was changed back to "Probation" for consistency.

Commented [BR(6)]: The extension of the probationary period has been done in practice.

2.

- C. **Interim Evaluation.** Interim or supplemental evaluations may be initiated by ~~at the immediate~~ supervisor whenever the ~~immediate~~ supervisor believes it to be in the best interest of the employee, ~~immediate~~ supervisor, ~~division~~ or department to do so. This type of evaluation is usually made whenever an employee's performance and/or work conduct has ~~significantly~~ markedly changed since a previous evaluation or whenever an employee has failed to improve after a previous less than satisfactory evaluation, counselling, or training. The Interim evaluation may include a Performance Improvement Plan (PIP). An overall rating of less than ~~Satisfactory~~ "Meets Expectations" at the conclusion of the PIP may result lead to in disciplinary progressive corrective action, up to and including termination, if improvement is not achieved.

3.

4. **3010.6 Performance Improvement Plan (PIP) Process/Unsatisfactory Job Performance.** When an employee receives an overall rating of less than ~~"Meets Expectations"~~ Satisfactory, the unsatisfactory performance evaluation must include a specific description of the unsatisfactory performance, behavior, conduct, or actions that are found to be below standards. Departments ~~Heads and supervisors~~, in coordination with Human Resources, are responsible for developing a Performance Improvement Plan (PIP) to identify the various ways the employee can improve their performance and be successful in achieving their assigned objectives. A PIP should ~~not exceed more than six (6) months and must clearly outline the include an understanding of goals, expectations, position requirements, and performance standards the employee is expected to meet.~~ The performance standards should reference the quantity and quality of work, the manner in which service is rendered, and such characteristics as shall measure the employee's job performance. (See Policy Number 3175). A PIP is not disciplinary, and is not an adverse employment action.

Commented [BR(7)]: The best practice is that PIP should not exceed 6 months.

3010.7 The Evaluation Form. The District utilizes a standardized Performance Evaluation Form. Upon delivery of the evaluation by the ~~immediate~~ supervisor to the employee, the employee shall sign acknowledging receipt, and the ~~immediate~~ supervisor shall provide a copy of the performance evaluation to the employee and submit the original to Human Resources. The original shall be placed in the employee's official

personnel file, and the department may keep a copy in a secured internal file. The employee may provide a separate written response within thirty (30) calendar days to Human Resources which will then be filed with the evaluation form.

3010.87 Employee Self-Evaluation Form. ~~Employees~~ Staff members are required to complete a Self-Evaluation Form prior to the evaluation conference with their immediate supervisor. The Self-Evaluation Form will be provided to Human Resources along with the completed Performance Evaluation Form and maintained in the employee's personnel file.

3010.9 Retaliation Prohibited. Employees shall not be subject to any form of retaliation, reprisal, or adverse treatment as a result of participating in the performance evaluation process, providing candid feedback through self-evaluations, responding to performance evaluations, or exercising their right to dispute or comment on evaluation content. This includes but is not limited to protection against retaliation for:

- A. Expressing concerns or disagreements with evaluation content;
- B. Submitting a written rebuttal or response;
- C. Requesting clarification, feedback, or support in achieving performance goals;
- D. Participating in good faith in any performance-related discussion, improvement plan, or appeal process.

Supervisors, managers, and any employee involved in the administration of the evaluation process are expected to uphold a culture of open communication, fairness, and professional integrity. Any employee who believes he/she has been retaliated against in connection with the performance evaluation process should report the concern to Human Resources or the General Manager or his/her designee. Such reports will be reviewed in accordance with applicable District policies, including those related to complaint resolution, anti-retaliation, and workplace conduct.

Commented [BR(8)]: No Retaliation Section added.

Attachment 2

CURRENT POLICY

POLICY TITLE: EMPLOYEE PERFORMANCE EVALUATION
POLICY NUMBER: 3010

3010.1 **Purpose.** To provide a means for discussing, planning, and reviewing the performance of an employee. Regular performance evaluations improve communication and employee engagement; help employees clearly define and understand their duties and responsibilities; document accomplishments during the rating period; suggest areas in which employees can improve performance; provide information for career development and training; help set goals and expectations for the next rating period, and provide a basis for awarding merit or step increases.

3010.2 **Policy.** All full- and part-time regular employees shall have their job performance evaluated on an annual basis. This policy does not preclude the conduct of more frequent evaluations as needed to document significant changes in performance.

3010.3 **Responsibilities.** Each manager and supervisor is responsible for the timely assessment of the performance and contribution of their employees. Human Resources will coordinate, track, and report on the completion of annual performance evaluations; provide training to managers and supervisors on conducting effective performance evaluations as necessary, and will maintain a copy of each evaluation in the employee's official personnel file. Human Resources will provide an annual compliance report to the General Manager by January 31st for the prior calendar year. The General Manager will share the statistical report (over-all percentage of compliance) with the Personnel Committee of the Board of Directors.

3010.4 **Standards.** Each supervisor is responsible for developing a clear description of the duties, responsibilities, goals, and expectations for each position to be evaluated. The duties and responsibilities must be consistent with the job description for each position. The goals and expectations should be aligned with the District's strategic goals and mission. The goals and expectations shall be provided to the employee prior to being evaluated against them.

3010.5 **Preparation of Evaluations.** All employees shall have their job performance evaluated by their immediate supervisor on an annual basis. Interim and/or introductory period evaluations may be completed as necessary to effectively document employee performance. Human Resources will review and provide comments (as necessary) on the drafted evaluation before it is delivered to the employee in an evaluation conference. In the event that Human Resources and the supervisor cannot come to a consensus, the matter may be referred to the General Manager and/or to legal counsel.

1. **Annual Evaluation.** All employees will have their performance evaluated at the time of their anniversary date (of hire, promotion, or transfer to their most recent position) with the District. The supervisor shall indicate on the Performance Evaluation Form when an eligible employee is recommended for a merit increase and sign the Personnel Action Form (Policy 3215). Employees receiving an overall rating of less than Satisfactory are not eligible to receive a merit increase.
2. **Introductory Evaluation.** Introductory evaluations may be completed during the introductory period (Policy 3000). Upon successful completion of the introductory period, employees shall transition to "Regular" status and receive an annual evaluation at the time of the employee's anniversary date. The introductory evaluation is the tool in which the immediate supervisor determines whether the introductory employee has the skills and other qualifications needed to perform satisfactorily. The immediate supervisor shall indicate on the Performance Evaluation Form if the introductory employee is recommended to pass the introductory period, or if an extension of the introductory

PROPOSED POLICY

POLICY TITLE: EMPLOYEE PERFORMANCE EVALUATION
POLICY NUMBER: 3010

3010.1 **Purpose.** To provide a means for discussing, planning, and reviewing the performance of an employee. Regular performance evaluations improve communication and employee engagement; help employees clearly define and understand their duties, ~~and~~ responsibilities ~~and the requirements of the position~~; document accomplishments during the rating period; suggest areas in which employees can improve performance; provide information for career development and training; help set goals and expectations for the next rating period, and provide a basis for awarding merit or step increases.

3010.2 **Policy.** All full- and part-time regular employees shall have their job performance evaluated on an annual basis. This policy does not preclude the conduct of more frequent evaluations as needed to document significant changes in performance.

3010.3 **Responsibilities.** Each manager and supervisor is responsible for the timely assessment of the performance and contribution of their employees. Human Resources will coordinate, track, and report on the completion of annual performance evaluations; provide ~~annual~~ training to managers and supervisors on conducting effective performance evaluations ~~as necessary~~, and will maintain a copy of each evaluation in the employee's official personnel file. Human Resources will provide an annual compliance report to the General Manager ~~or his/her designee~~ by January 31st for the prior calendar year, ~~and The General Manager will share the statistical report (over-all percentage of compliance) with the Personnel Committee of the Board of Directors.~~

3010.4 **Standards.** Each supervisor is responsible for developing a clear description of the duties, responsibilities, goals, and expectations for each position to be evaluated. The duties and responsibilities, ~~and position requirements~~ must be consistent with the job description for each position. The goals and expectations should be aligned with the District's strategic goals, ~~organizational development~~ and mission. The goals and expectations shall be provided to the employee prior to being evaluated against them ~~within the 12-month period following the performance evaluation.~~

3010.5 **Preparation of Evaluations.** All employees shall have their job performance evaluated by their immediate supervisor on an annual basis. Interim and/or ~~introductory~~ period evaluations may be completed as necessary to effectively document employee performance. ~~The Department Head and Human Resources will~~ shall review and provide comments (as necessary) on the drafted evaluation before it is delivered to the employee in an evaluation conference. In the event that Human Resources, ~~the Department Head and the supervisor cannot come to a consensus, the matter may be referred to the General Manager or his/her designee, and/or legal counsel.~~

A. **Annual Evaluation.** All employees will have their performance evaluated at the time of their anniversary date (of hire, ~~rehire~~, promotion, ~~position reclassification~~, transition to "Regular" status or transfer to their most recent position) with the District. The supervisor shall indicate on the Performance Evaluation Form when an eligible employee is recommended for a merit increase and sign the Personnel Action Form (See Policy Number 3215). ~~If the employee receives a performance rating of "Meets Expectations" or higher, and continues to satisfy the essential qualifications of the position, including but not limited to maintaining any required licenses or certifications, adherence to safety standards, and any other job-specific requirements, he/she shall be eligible for an increase to the next step within his/her salary range, provided his/her has not reached the maximum step of the range.~~ Employees receiving

period is necessary. An extension of the introductory period must be approved by the General Manager or their designee. The extension of the introductory period must be accompanied by a Performance Improvement Plan (PIP). The PIP should run concurrently with the extension period. An overall rating of Unsatisfactory may result in termination of employment.

3. **Interim Evaluation.** Interim or supplemental evaluations may be initiated by a supervisor whenever the supervisor believes it to be in the best interest of the employee, supervisor, or department to do so. This type of evaluation is usually made whenever an employee's performance and/or work conduct has markedly changed since a previous evaluation or whenever an employee has failed to improve after a previous less than satisfactory evaluation, counseling, or training. The Interim evaluation may include a Performance Improvement Plan (PIP). An overall rating of less than Satisfactory may result in disciplinary action, up to and including termination if improvement is not achieved.

4. **Unsatisfactory Job Performance.** When an employee receives an overall rating of less than Satisfactory, the unsatisfactory performance evaluation must include a specific description of the unsatisfactory performance, behavior, conduct, or actions that are found to be below standard. Departments, in coordination with Human Resources, are responsible for developing a Performance Improvement Plan (PIP) to identify the various ways the employee can improve their performance and be successful in achieving their assigned objectives. A PIP should include an understanding of goals, expectations, and performance standards. The performance standards should reference the quantity and quality of work, the manner in which service is rendered, and such characteristics as shall measure the employee's job performance.

3010.6 **The Evaluation Form.** The District utilizes a standardized Performance Evaluation Form. Upon delivery of the evaluation by the supervisor to the employee, the employee shall sign acknowledging receipt, and the supervisor shall provide a copy of the performance evaluation to the employee and submit the original to Human Resources. The original shall be placed in the employee's official personnel file, and the department may keep a copy in a secured internal file. The employee may provide a separate written response within 30 calendar days to Human Resources which will then be filed with the evaluation form.

3010.7 Employees are required to complete a Self-Evaluation Form prior to the evaluation conference with their supervisor. The Self-Evaluation Form will be provided to Human Resources along with the completed Performance Evaluation Form and maintained in the employee's personnel file.

an overall rating of less than "Meets Expectations" Satisfactory are not eligible to receive a merit increase. In no event shall a performance evaluation be considered disciplinary, regardless of the rating.

4. **Probationary Introductory Evaluation.** ~~Introductory Performance evaluations shall~~ be completed during upon the conclusion of the ~~introductory probationary period~~ (See Policy 3000). Upon successful completion of the ~~introductory probationary period~~, employees shall transition to "Regular" status and receive an annual performance evaluations based on the date he/she attained "Regular" status ~~at the time of the employee's anniversary date~~. The ~~introductory probationary~~ evaluation is the tool in which the immediate supervisor determines whether the ~~introductory probationary~~ employee has the skills and other qualifications needed to perform satisfactorily. The immediate supervisor shall indicate on the Performance Evaluation Form if the ~~introductory probationary~~ employee is recommended to pass the ~~introductory probationary period~~, or if an extension of the ~~introductory probationary period~~ is necessary. An extension of the ~~introductory probationary period~~ must be approved by the General Manager or his/her ~~their~~ designee and ~~the extension of the introductory period must be accompanied by a Performance Improvement Plan (PIP). The PIP should~~ run concurrently with the extended ~~probationary~~ period. If the District determines that the designated probationary period does not allow sufficient time to thoroughly evaluate the employee's performance, the probationary period may be extended one time for a total of up to twelve (12) months at the discretion of the General Manager or his/her designee. An overall performance rating of less than ~~Unsatisfactory~~ "Meets Expectations" at the conclusion of the PIP may result ~~lead to a disciplinary progressive corrective action, up to and including termination~~ of employment.

2. **Interim Evaluation.** Interim or supplemental evaluations may be initiated by ~~the immediate~~ supervisor whenever the ~~immediate~~ supervisor believes it to be in the best interest of the employee, ~~immediate~~ supervisor, division or department to do so. This type of evaluation is usually made whenever an employee's performance and/or work conduct has significantly ~~markedly~~ changed since a previous evaluation or whenever an employee has failed to improve after a previous less than satisfactory evaluation, counseling, or training. The Interim evaluation may include a Performance Improvement Plan (PIP). An overall rating of less than Satisfactory "Meets Expectations" at the conclusion of the PIP may result ~~lead to a disciplinary progressive corrective action, up to and including termination, if improvement is not achieved~~.

2. **4-3010.6 Performance Improvement Plan (PIP) Process** ~~Unsatisfactory Job Performance~~. When an employee receives an overall rating of less than "Meets Expectations" Satisfactory, the unsatisfactory performance evaluation must include a specific description of the unsatisfactory performance, behavior, conduct, or actions that are found to be below standards. Departments Heads and supervisors, in coordination with Human Resources, are responsible for developing a Performance Improvement Plan (PIP) to identify the various ways the employee can improve their performance and be successful in achieving their assigned objectives. A PIP should ~~not exceed more than six (6) months and must clearly outline the include an understanding of~~ goals, expectations, position requirements, and performance standards the employee is expected to meet. The performance standards should reference the quantity and quality of work, the manner in which service is rendered, and such characteristics as shall measure the employee's job performance. (See Policy Number 3175). A PIP is not disciplinary, and is not an adverse employment action.

3010.7 **The Evaluation Form.** The District utilizes a standardized Performance Evaluation Form. Upon delivery of the evaluation by the ~~immediate~~ supervisor to the employee, the employee shall sign acknowledging receipt, and the ~~immediate~~ supervisor shall provide a copy of the performance evaluation to the employee and submit the original to Human Resources. The original shall be placed in the employee's official

personnel file, and the department may keep a copy in a secured internal file. The employee may provide a separate written response within thirty (30) calendar days to Human Resources which will then be filed with the evaluation form.

3010.87 Employee Self-Evaluation Form. Employees ~~staff members~~ are required to complete a Self-Evaluation Form prior to the evaluation conference with their ~~immediate~~ supervisor. The Self-Evaluation Form will be provided to Human Resources along with the completed Performance Evaluation Form and maintained in the employee's personnel file.

3010.9 Retaliation Prohibited. Employees shall not be subject to any form of retaliation, reprisal, or adverse treatment as a result of participating in the performance evaluation process, providing candid feedback through self-evaluations, responding to performance evaluations, or exercising their right to dispute or comment on evaluation content. This includes but is not limited to protection against retaliation for

- A. Expressing concerns or disagreements with evaluation content;
- B. Submitting a written rebuttal or response;
- C. Requesting clarification, feedback, or support in achieving performance goals;
- D. Participating in good faith in any performance-related discussion, improvement plan, or appeal process.

Supervisors, managers, and any employee involved in the administration of the evaluation process are expected to uphold a culture of open communication, fairness, and professional integrity. Any employee who believes he/she has been retaliated against in connection with the performance evaluation process should report the concern to Human Resources or the General Manager or his/her designee. Such reports will be reviewed in accordance with applicable District policies, including those related to complaint resolution, anti-retaliation, and workplace conduct.

POLICY TITLE: EMPLOYEE PERFORMANCE EVALUATION
POLICY NUMBER: 3010

3010.1 Purpose. To provide a means for discussing, planning, and reviewing the performance of an employee. Regular performance evaluations improve communication and employee engagement; help employees clearly define and understand their duties, responsibilities and the requirements of the position; document accomplishments during the rating period; suggest areas in which employees can improve performance; provide information for career development and training; help set goals and expectations for the next rating period; and provide a basis for awarding merit or step increases.

3010.2 Policy. All full- and part-time regular employees shall have their job performance evaluated on an annual basis. This policy does not preclude the conduct of more frequent evaluations as needed to document significant changes in performance.

3010.3 Responsibilities. Each manager and supervisor is responsible for the timely assessment of the performance and contribution of their employees. Human Resources will coordinate, track, and report on the completion of annual performance evaluations; provide training to managers and supervisors on conducting effective performance evaluations as necessary; and will maintain a copy of each evaluation in the employee's official personnel file. Human Resources will provide an annual compliance report to the General Manager or his/her designee by January 31st for the prior calendar year, and will share the statistical report (overall percentage of compliance) with the Personnel Committee of the Board of Directors.

3010.4 Standards. Each supervisor is responsible for developing a clear description of the duties, responsibilities, goals, and expectations for each position to be evaluated. The duties and responsibilities, and position requirements must be consistent with the job description for each position. The goals and expectations should be aligned with the District's strategic goals, organizational development and mission. The goals and expectations shall be provided to the employee prior to being evaluated against them within the 12-month period following the performance evaluation.

3010.5 Preparation of Evaluations. All employees shall have their job performance evaluated by their immediate supervisor on an annual basis. Interim and/or probationary period evaluations may be completed as necessary to effectively document employee performance. The Department Head and Human Resources will review and provide comments (as necessary) on the drafted evaluation before it is delivered to the employee in an evaluation conference. In the event that Human Resources, the Department Head and the supervisor cannot come to a consensus, the matter may be referred to the General Manager or his/her designee.

- A. **Annual Evaluation.** All employees will have their performance evaluated at the time of their anniversary date (of hire, rehire, promotion, position reclassification, transition to "Regular" status or transfer to their most recent position) with the District. The supervisor shall indicate on the Performance Evaluation Form when an eligible employee is recommended for a merit increase and sign the Personnel Action Form (See Policy Number 3215). If the employee receives a performance rating of "Meets Expectations" or higher, and continues to satisfy the essential qualifications of the position, including but not limited to maintaining any required licenses or certifications, adherence to safety standards, and any other job-specific requirements, he/she shall be eligible for an increase to the next step within his/her salary range, provided his/her has not reached the maximum step of the range. Employees receiving an overall rating of less than "Meets Expectations" are not eligible to receive a merit increase. In no event shall a performance evaluation be considered disciplinary, regardless of the rating.

- B. **Probationary Evaluation.** Performance evaluations shall be completed upon the conclusion of the probationary period (See Policy 3000). Upon successful completion of the probationary period, employees shall transition to "Regular" status and receive annual performance evaluations based on the date he/she attained "Regular" status. The probationary evaluation is the tool in which the immediate supervisor determines whether the probationary employee has the skills and other qualifications needed to perform satisfactorily. The immediate supervisor shall indicate on the Performance Evaluation Form if the probationary employee is recommended to pass the probationary period, or if an extension of the probationary period is necessary. An extension of the probationary period must be approved by the General Manager or his/her designee and must be accompanied by a Performance Improvement Plan (PIP). The PIP shall run concurrently with the extended probationary period. If the District determines that the designated probationary period does not allow sufficient time to thoroughly evaluate the employee's performance, the probationary period may be extended one time for a total of up to twelve (12) months at the discretion of the General Manager or his/her designee. An overall performance rating of less than "Meets Expectations" at the conclusion of the PIP may lead to progressive corrective action, up to and including termination of employment.
- C. **Interim Evaluation.** Interim or supplemental evaluations may be initiated by the immediate supervisor whenever the immediate supervisor believes it to be in the best interest of the employee, immediate supervisor, division or department to do so. This type of evaluation is usually made whenever an employee's performance and/or work conduct has significantly changed since a previous evaluation or whenever an employee has failed to improve after a previous less than satisfactory evaluation, counselling, or training. The Interim evaluation may include a Performance Improvement Plan (PIP). An overall rating of less than "Meets Expectations" at the conclusion of the PIP may lead to progressive corrective action, up to and including termination.

3010.6 Performance Improvement Plan (PIP) Process. When an employee receives an overall rating of less than "Meets Expectations", the unsatisfactory performance evaluation must include a specific description of the unsatisfactory performance, behavior, conduct, or actions that are found to be below standards. Department Heads and supervisors, in coordination with Human Resources, are responsible for developing a Performance Improvement Plan (PIP) to identify the various ways the employee can improve their performance and be successful in achieving their assigned objectives. A PIP should not exceed more than six (6) months and must clearly outline the goals, expectations, position requirements, and performance standards the employee is expected to meet. The performance standards should reference the quantity and quality of work, the manner in which service is rendered, and such characteristics as shall measure the employee's job performance. (See Policy Number 3175). A PIP is not disciplinary, and is not an adverse employment action.

3010.7 The Evaluation Form. The District utilizes a standardized Performance Evaluation Form. Upon delivery of the evaluation by the immediate supervisor to the employee, the employee shall sign acknowledging receipt, and the immediate supervisor shall provide a copy of the performance evaluation to the employee and submit the original to Human Resources. The original shall be placed in the employee's official personnel file, and the department may keep a copy in a secured internal file. The employee may provide a separate written response within thirty (30) calendar days to Human Resources which will then be filed with the evaluation form.

3010.8 Employee Self-Evaluation Form. Employees are required to complete a Self-Evaluation Form prior to the evaluation conference with their immediate supervisor. The Self-Evaluation Form will be provided

to Human Resources along with the completed Performance Evaluation Form and maintained in the employee's personnel file.

3010.9 Retaliation Prohibited. Employees shall not be subject to any form of retaliation, reprisal, or adverse treatment as a result of participating in the performance evaluation process, providing candid feedback through self-evaluations, responding to performance evaluations, or exercising their right to dispute or comment on evaluation content. This includes but is not limited to protection against retaliation for:

- A. Expressing concerns or disagreements with evaluation content;
- B. Submitting a written rebuttal or response;
- C. Requesting clarification, feedback, or support in achieving performance goals;
- D. Participating in good faith in any performance-related discussion, improvement plan, or appeal process.

Supervisors, managers, and any employee involved in the administration of the evaluation process are expected to uphold a culture of open communication, fairness, and professional integrity. Any employee who believes he/she has been retaliated against in connection with the performance evaluation process should report the concern to Human Resources or the General Manager or his/her designee. Such reports will be reviewed in accordance with applicable District policies, including those related to complaint resolution, anti-retaliation, and workplace conduct.



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 6d

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions for Policy 3180
Nepotism / Employment of Relatives and Fraternization

Staff Recommendation

Approve the revision of Policy 3180 Nepotism / Employment of Relatives and Fraternization to move forward to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing revisions to Policy 3180 to expand its applicability, clarify existing provisions, and strengthen the District's framework regarding potential conflicts of interest, especially concerning Board Member influence over hiring decisions. This revision follows Legal Counsel's recommendation to remove the Nepotism section from the Ethics Policy to avoid redundancy and defer to this comprehensive policy. The updated policy also aims to align expectations and accountability between District employees and Board Members.

Revisions were reviewed in coordination with District Legal Counsel to ensure compliance with applicable labor laws and public agency best practices. The improved structure enhances policy flow, provides better readability, and reduces legal risk in the event of complaints or claims involving favoritism, conflicts of interest, or wrongful termination.

Background

On July 10, 2024, the Board of Directors approved Policy 3180 through Resolution 2024-10. Subsequently, during the Ad Hoc Board Policies Committee meeting held on June 10, 2025, the Committee reviewed Policy 4095 Ethics Policy. During this review, Legal Counsel recommended removing the section of Policy 4095 that addresses Conflict of Interest because a separate policy (Policy 3180 Nepotism / Employment of Relatives and Fraternization) already exists to address such matters.

Upon conducting a side-by-side comparison of the Conflict of Interest provisions in Policy 4095 and Policy 3180, the Ad Hoc Board Policies Committee identified a misalignment: Policy 4095 prohibited Board Members from recommending relatives for employment, but Policy 3180 did not contain a corresponding restriction for District employees. To correct this inconsistency and ensure alignment in expectations between Board Members and District employees, the Committee directed staff to review and revise Policy 3180.

In response, staff audited Policy 3180 and identified structural and substantive gaps, including areas lacking clarity regarding conflict of interest and internal process integrity. Legal Counsel was engaged to review the proposed revisions and ensure compliance with applicable labor laws, strengthen protections against potential legal risk, and improve the policy's structure for greater transparency and enforceability.



Discussion

Table A, Summary of Policy Changes, outlines the proposed changes to the current Nepotism / Employment of Relatives and Fraternization (policy) that are in reference to the redlined draft version attached herewith.

Table A – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact
1	Section 3180.5	None	The Nepotism policy is applicable to Board Members and all District employees.	Relocated this section as 3180.2 and added Board Members.	No fiscal impact.
2	Section 3180.4	None	The District identified all relatives including 2 nd degree familial relationships.	Relocated this section as 3180.3. Legal Counsel advised to choose whether to use the Labor Code or just enumerate the relationships to avoid discrepancy.	No fiscal impact.
3	Section 3180.9	None	The District also included in this policy fraternization as a form of conflict of interest.	Relocated this section as 3180.4. Legal Counsel recommended removing same department. She also added the language “intimate”.	No fiscal impact.
4	None	None	The Ethics Policy prohibits any Board Member to recommend employment of a relative to the District. This is not mentioned in Policy 3180 for staff.	Added Section 3180.6 and included the language based on Policy 4095, and made applicable to employees as well.	No fiscal impact.
5	Section 3180.6	None	The District prohibits familial or fraternal relationship between supervisor and employee.	Legal Counsel recommends expanding this definition to include all the powers exercised by the supervisor regardless of his/her title.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Policy Section and Language to Consider	Fiscal Impact of Section
6	Section 3180.7	None	Not applicable	Relocated this as Section 3180.8	No fiscal impact
7	Section 3180.8	None	The General Manager will make a decision who to separate in case two individuals are married or in an intimate relationship that may create a conflict of interest.	Legal Counsel advised this language be removed to avoid legal risk. She also recommended crafting a language that in case one is separated because of the conflict interest, the District may provide severance package and to require to sign the claim release waiver.	The fiscal impact is the severance package provided if this is considered by the General Manager.

Fiscal Impact

There is no fiscal impact associated with the proposed revisions to Policy 3180. The changes are primarily administrative and preventative in nature, aimed at improving clarity, compliance, and risk mitigation rather than altering compensation or staffing levels.

Attachments

1. Redlined version Policy Number 3180 Nepotism / Employment of Relatives and Fraternization
2. Side-by-Side version Policy Number 3180 Nepotism / Employment of Relatives and Fraternization
3. Cleaned version Policy Number 3180 Nepotism / Employment of Relatives and Fraternization

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

POLICY TITLE: NEPOTISM / EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Applicability. This policy shall apply to Board Members and all full-time, part time, temporary and contracted employees of the District.

3180.34 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: as defined by Labor Code Section 245.5 (c) spouse, domestic partner, child, step-children, stepchildren, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. . In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

Commented [RTG1]: The Labor Code does not include all of the relationships listed (e.g., aunt, uncle, niece) in its definition of family member. So I would either reference the Labor Code or list the family members that you intend to cover in this policy.

3180.4 Fraternization Defined. Fraternization means a romantic and/or sexual or intimate relationship between a supervisor and subordinate employee within the direct chain of command or same Department.

Commented [RTG2]: Not clear whether fraternization would apply to same-department employees if they are not in a direct supervisor-subordinate relationship

3180.52 External and Internal Selection Process and Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial/relative status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The Department Head, in consultation with the Human Resources Manager, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

Adopted by Resolution 24-010, 07/10/2024

BEAUMONT-CHERRY VALLEY WATER DISTRICT

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.6 Prohibited Recommendations for Contract-Interested Relatives. To preserve the integrity of the District's procurement and employment processes, no Board Member or employee of the District shall exert influence, pressure, or authority, either directly or indirectly, the employment, appointment, or selection of any relative as defined in Section 3180.3, or any individual with whom they have a known romantic and/or sexual relationship as defined in Section 3180.4, who is currently bidding for, negotiating, or holding a contract or subcontract with the District. This restriction applies whether the individual is seeking employment through an external or internal selection process and regardless of whether the contract is directly or indirectly with the District, and is intended to prevent any actual or perceived conflict of interest while upholding the District's commitment to ethical governance and transparent operations.

3180.67 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgement. Employees, including the General Manager may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship. (Please refer to Section 3180.8 Conflict of Interest Management). For the purposes of this policy, a "supervisory employee" or "supervisor" means any employee, regardless of job description or title, who has been assigned responsibility to direct, oversee, coordinate, or influence the work of other employees. This includes, but is not limited to, employees who:

- A. Have the authority, in the interest of the District, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees;
- B. Have the responsibility to direct or assign work, adjust grievances, or effectively recommend such actions, even if such authority is exercised in consultation with or subject to approval by higher-level management;
- C. Provide day-to-day direction or oversight of the work of other employees, even if they do not exercise full independent judgment in personnel matters.

The term "supervisory employee" is intended to include those who function in a lead, team lead, or similar capacity where they are responsible for guiding, assigning, or reviewing the work of others, whether or not they make final decisions on employment actions. Under no circumstances that an employee, including the General Manager, may be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

3180.8 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an

Commented [RTG3]: This definition is very narrow and may not encompass all employees you think of as supervisors. I would consider revising to ensure all supervisory employees are included. For example, if you have an employee directing the work of another employee, but there is no independent judgment required (perhaps they have to consult with a higher-up supervisor), this definition would probably not include them.

Adopted by Resolution 24-010, 07/10/2024

BEAUMONT-CHERRY VALLEY WATER DISTRICT

employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.7 Determination. Where the Department Head, in conjunction with ~~the~~ Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager or his/her designee. The General Manager or his/her designee may deny employment based on adverse impact; or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District. If the General Manager is the hiring manager, the determination to hire shall be made by the Personnel Committee of the Board of Directors.

~~**3180.4 Relatives Defined.** This policy applies to individuals who are related by blood, marriage or adoption including the following relationships as defined by Labor Code Section 245.5 (c) spouse, domestic partner, child, step-children, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.~~

~~**3180.5 Applicability.** This policy shall apply to all full-time, part-time, temporary and contracted employees of the District.~~

~~**3180.7 Disclosure Requirement.** Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.~~

3180.98 Conflict of Interest Management. When two (2) existing employees marry, or become relatives due to other individuals' marriage, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager or his/her designee, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager or his/her designee that one of the employees must separate from District employment within sixty (60) days. ~~The choice of who shall separate from District service shall be made by the General Manager or his/her designee.~~

In such cases, the District may, at its discretion, offer a severance package to the separating employee. As a condition of receiving severance, the employee shall be required to sign a written waiver and release of claims against the District, in a form approved by District legal counsel, which includes a general release of all claims arising from the employment relationship and separation

Relatives may be eligible for promotion or transfer based on their qualifications and performance.

~~Adopted by Resolution 24-010, 07/10/2024~~

Commented [RTG4]: You do not need to put this in the policy, but I recommend that you provide a severance and require the employee to sign a waiver and release of claims in the event they are separated due to a relationship.

BEAUMONT-CHERRY VALLEY WATER DISTRICT

Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager or his/her designee. If the conflict of interest is between the General Manager and the employee, the decision to separate shall be determined by the Full Board of Directors through the recommendation of the Personnel Committee.

~~**3180.9 Fraternalization Defined.** Fraternalization means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.~~

3180.10 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.11 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager or his/her designee.

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the proscribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to a transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.13 Consequences of Violation. Violations of this policy may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.

~~Adopted by Resolution 24-010, 07/10/2024~~

Attachment 2

CURRENT POLICY

POLICY TITLE: NEPOTISM / EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Selection Process/Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The Department Head, in consultation with the Human Resources Manager, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.3 Determination. Where the Department Head, in conjunction with the Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager or his/her designee. The General Manager or his/her designee may deny employment based on adverse impact, or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District. If the General Manager is the hiring manager, the determination to hire shall be made by the Personnel Committee of the Board of Directors.

PROPOSED POLICY

POLICY TITLE: NEPOTISM / EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Applicability. This policy shall apply to Board Members and all fulltime, part time, temporary and contracted employees of the District

3180.34 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: as defined by Labor Code Section 245.5 (a) spouse, domestic partner, child, step-children, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

3180.4 Fraternization Defined. Fraternization means a romantic and/or sexual or intimate relationship between a supervisor and subordinate employee within the direct chain of command ~~or same Department.~~

3180.52 External and Internal Selection Process and Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial ~~relative~~ status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The Department Head, in consultation with ~~the~~ Human Resources ~~Manager~~, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

3180.4 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships as defined by Labor Code Section 245.5 (c) spouse, domestic partner, child, step-children, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

3180.5 Applicability. This policy shall apply to all full-time, part time, temporary and contracted employees of the District.

3180.6 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgment. Employees, including the General Manager may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship. (Please refer to Section 3180.8 Conflict of Interest Management)

3180.7 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.8 Conflict of Interest Management. When two (2) existing employees marry, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager or his/her designee, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager or his/her designee that one of the employees must separate from District employment within sixty (60) days. The choice of who shall separate from District service shall be made by the General Manager or his/her designee. Relatives may be eligible for promotion or transfer based on their qualifications and performance. Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager or his/her designee. If the conflict of interest is between the General Manager and the employee, the decision to separate shall be determined by the Full Board of Directors through the recommendation of the Personnel Committee.

3180.9 Fraternization Defined. Fraternization means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.

3180.10 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct,

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.6 Prohibited Recommendations for Contract-Interested Relatives. To preserve the integrity of the District's procurement and employment processes, no Board Member or employee of the District shall exert influence, pressure, or authority, either directly or indirectly, the employment, appointment, or selection of any relative as defined in Section 3180.3, or any individual with whom they have a known romantic and/or sexual relationship as defined in Section 3180.4, who is currently bidding for, negotiating, or holding a contract or subcontract with the District. This restriction applies whether the individual is seeking employment through an external or internal selection process and regardless of whether the contract is directly or indirectly with the District, and is intended to prevent any actual or perceived conflict of interest while upholding the District's commitment to ethical governance and transparent operations.

3180.67 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgment. Employees, including the General Manager may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship. (Please refer to Section 3180.8 Conflict of Interest Management) For the purposes of this policy, a "supervisory employee" or "supervisor" means any employee, regardless of job description or title, who has been assigned responsibility to direct, oversee, coordinate, or influence the work of other employees. This includes, but is not limited to, employees who:

- A. Have the authority, in the interest of the District, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees;
- B. Have the responsibility to direct or assign work, adjust grievances, or effectively recommend such actions, even if such authority is exercised in consultation with or subject to approval by higher-level management;
- C. Provide day-to-day direction or oversight of the work of other employees, even if they do not exercise full independent judgment in personnel matters.

The term "supervisory employee" is intended to include those who function in a lead, team lead, or similar capacity where they are responsible for guiding, assigning, or reviewing the work of others, whether or not they make final decisions on employment actions. Under no circumstances shall an employee, including the General Manager, may be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

3180.8 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an

indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.11 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager or his/her designee.

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the prescribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to a transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.13 Consequences of Violation. Violations of this policy will may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.

employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.7 Determination. Where the Department Head, in conjunction with the Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager or his/her designee. The General Manager or his/her designee may deny employment based on adverse impact, or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District. If the General Manager is the hiring manager, the determination to hire shall be made by the Personnel Committee of the Board of Directors.

3180.4 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships as defined by Labor Code Section 245.5 (c) spouse, domestic partner, child, step children, parent, step parent, grandparent, grandchild, brother, sister, half brother, half sister, aunt, uncle, niece, nephew, parent in law, daughter in law, son in law, brother in law and sister in law. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

3180.5 Applicability. This policy shall apply to all full time, part time, temporary and contracted employees of the District.

3180.7 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.98 Conflict of Interest Management. When two (2) existing employees marry or become relatives due to other individuals' marriage, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager or his/her designee, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager or his/her designee that one of the employees must separate from District employment within sixty (60) days. The choice of who shall separate from District service shall be made by the General Manager or his/her designee.

In such cases, the District may, at its discretion, offer a severance package to the separating employee. As a condition of receiving severance, the employee shall be required to sign a written waiver and release of claims against the District, in a form approved by District legal counsel, which includes a general release of all claims arising from the employment relationship and separation.

Relatives may be eligible for promotion or transfer based on their qualifications and performance.

Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager or his/her designee. If the conflict of interest is between the General Manager and the employee, the decision to separate shall be determined by the Full Board of Directors through the recommendation of the Personnel Committee.

~~**3180.9 – Fraternization Defined.** Fraternization means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.~~

3180.10 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.11 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager or his/her designee.

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the proscribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to a transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.13 Consequences of Violation. Violations of this policy may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.

POLICY TITLE: NEPOTISM / EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Applicability. This policy shall apply to Board Members and all full-time, part time, temporary and contracted employees of the District.

3180.3 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: spouse, domestic partner, child, stepchildren, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

3180.4 Fraternization Defined. Fraternization means a romantic and/or sexual or intimate relationship between a supervisor and subordinate employee within the direct chain of command.

3180.5 External and Internal Selection Process and Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial/relative status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The Department Head, in consultation with Human Resources, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.

- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.6 Prohibited Recommendations for Contract-Interested Relatives. To preserve the integrity of the District's procurement and employment processes, no Board Member or employee of the District shall exert influence, pressure, or authority, either directly or indirectly, the employment, appointment, or selection of any relative as defined in Section 3180.3, or any individual with whom they have a known romantic and/or sexual relationship as defined in Section 3180.4, who is currently bidding for, negotiating, or holding a contract or subcontract with the District. This restriction applies whether the individual is seeking employment through an external or internal selection process and regardless of whether the contract is directly or indirectly with the District, and is intended to prevent any actual or perceived conflict of interest while upholding the District's commitment to ethical governance and transparent operations.

3180.7 Supervisory Relationship. For the purposes of this policy, a "supervisory employee" or "supervisor" means any employee, regardless of job description or title, who has been assigned responsibility to direct, oversee, coordinate, or influence the work of other employees. This includes, but is not limited to, employees who:

- A. Have the authority, in the interest of the District, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees;
- B. Have the responsibility to direct or assign work, adjust grievances, or effectively recommend such actions, even if such authority is exercised in consultation with or subject to approval by higher-level management;
- C. Provide day-to-day direction or oversight of the work of other employees, even if they do not exercise full independent judgment in personnel matters.

The term "supervisory employee" is intended to include those who function in a lead, team lead, or similar capacity where they are responsible for guiding, assigning, or reviewing the work of others, whether or not they make final decisions on employment actions. Under no circumstances that an employee, including the General Manager, may be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

3180.8 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to Human Resources at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.7 Determination. Where the Department Head, in conjunction with Human Resources, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager or his/her designee. The General Manager or his/her designee may deny employment based on adverse impact; or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District. If the General Manager is the hiring manager, the determination to hire shall be made by the Personnel Committee of the Board of Directors.

3180.9 Conflict of Interest Management. When two (2) existing employees marry, become relatives due to other individuals' marriage, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above

exists, the Personnel Committee in conjunction with the General Manager or his/her designee, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager or his/her designee that one of the employees must separate from District employment within sixty (60) days.

In such cases, the District may, at its discretion, offer a severance package to the separating employee. As a condition of receiving severance, the employee shall be required to sign a written waiver and release of claims against the District, in a form approved by District legal counsel, which includes a general release of all claims arising from the employment relationship and separation.

Relatives may be eligible for promotion or transfer based on their qualifications and performance. Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager or his/her designee. If the conflict of interest is between the General Manager and the employee, the decision to separate shall be determined by the Full Board of Directors through the recommendation of the Personnel Committee.

3180.10 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.11 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager or his/her designee.

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the proscribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.13 Consequences of Violation. Violations of this policy may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
July 15, 2025**

Item 7

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: Policy Tracking Matrix Progress Dashboard

Staff Recommendation

Approve the policies pending review in the next one to two months, identified on Table 3, Policy to Work on for Subsequent Meetings, or to direct staff as desired.

Background

At the October 17, 2023 meeting, staff was directed by the Personnel Committee to create a dashboard to outline the progress of the Policies and Procedures Manual updates since year 2021. At the November 21, 2023 meeting, the Personnel Committee approved a dashboard presented by staff which highlights the summary of all policies approved and drafted, and those policies that staff are working on for subsequent meetings.

At the March 18, 2025 meeting, HR staff reported to the Personnel Committee that all personnel-related policies had reached 100 percent completion following the adoption of the final set of policies by the Board of Directors at the March 12, 2025 Regular Board Meeting. However, HR staff recognize that policies must evolve in response to ongoing developments within the District. Following a comprehensive audit, HR staff identified that certain policies require further refinement to ensure staff and leadership have clear, complete, and practical guidance.

Discussion:

Table 1-Summary of Policy Approval Tracking (All Policies)

Department	On Matrix	Draft Created	Committee / Board Reviewed Drafts	Board Approved	% Complete
Board Administration	27	27	22	15	55.56%
Engineering	8	8	1	1	12.50%
Finance	17	16	11	9	52.94%
Human Resources	69	69	69	62 ¹	89.86%
Information Technology (Personnel-Related)	18	18	13	13	72.22%
TOTALS	139	139	116	100	71.94%

¹ Human Resources identified Personnel policies that are outdated based on current District practices and applicable laws.



Table 2 – Recommended Policies to be added to the Policy Matrix

Item	Policy Subject	Policy Contents
None		

Table 3 – Policies To Work on for Subsequent Meetings

Item	Policy No.	Priorities Listed	Draft Size	Selected for Processing	Estimated Committee Presentation
1	2020	Sexual Harassment	3 pages	July	August
2	2025	Whistleblower Protection	2 pages	July	August
3	3225	Employee Leave Donation Program	5 pages	July	August
4	7013	Personally Identifiable Information	2 pages	June	July
5	7014	Artificial Intelligence (AI)	2 pages	June	July

Numbered for ease of selection and reference, not for level of priority.

Fiscal Impact

There is no financial impact.

Attachments

1. Policy Approval Tracking Matrix

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

**Policy Approval Tracking
BCVWD Policy Manual Project**

Policy Number	New Policy Number	Section	Policy Name <i>Definitions</i>	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
2	1000	General	Contractual Provisions	Human Resources	Yes	6/28/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-18
3	1005	General	Policy Manual	Human Resources	Yes	N/A	7/22/2021	7/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-06
5	2010	Administration	Equal Opportunity	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	1/8/2025	1/8/2025	1/8/2025	2025-01
6	2015	Personnel	Access to Personnel Records	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-06
7	2020	Administration	Harassment	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	2024-06
N/A	2025	Administration	Sexual Harassment	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-06
8	3000	Personnel	Whistleblower Protection	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	2021-06
N/A	3001	Personnel	Employee Status	Human Resources	Yes	5/29/2025	7/15/2025	7/15/2025				
N/A	3002	Personnel	Employee Information and Emergency	Human Resources	Yes	4/12/2021	6/11/2021	6/11/2021	10/13/2021	10/13/2021	10/13/2021	2021-18
9	3002	Personnel	Employee Groups	Human Resources	Yes	4/12/2021	5/17/2021	5/17/2021	10/13/2021	10/13/2021	10/13/2021	2021-18
N/A	3005	Personnel	Compensation	Human Resources	Yes	5/29/2025	7/15/2025	7/15/2025				
10 & 49	3006	Personnel	Prevailing Wage-Public Works Contractor	Human Resources	Yes	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-18
11	3010	Personnel	Employee Performance Evaluation	Human Resources	Yes	5/29/2025	7/15/2025	7/15/2025				
12	3020	Personnel	Performance Evaluation-General	Human Resources	Yes	8/3/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	2021-18
13	3025	Personnel	Health and Welfare Benefits	Human Resources	Yes	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	2022-19
14	3030	Personnel	Pay Periods	Human Resources	Yes	10/12/2021	11/15/2021	11/15/2021	5/11/2022	5/11/2022	5/11/2022	2022-16
15	3035	Personnel	Gift Acceptance Guidelines	Human Resources	Yes	6/3/2025	6/17/2025	6/17/2025				
16	3040	Personnel	Outside Employment	Human Resources	Yes	10/12/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-16
17	3045	Personnel	Letters of Recommendation	Human Resources	Yes	6/28/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-12
18	3050	Personnel	Executive Officer	Human Resources	Yes	7/29/2024	8/20/2024	8/20/2024	1/8/2025	1/8/2025	1/8/2025	2025-01
19	3055	Personnel	Volunteer Personnel Workers'	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	8/14/2024	8/14/2024	8/14/2024	2024-12
20 (incorrect)	3060	Personnel	Work Hours, Overtime, and Standby	Human Resources	Yes	6/14/2024	7/19/2024	7/19/2024	9/14/2024	9/14/2024	9/14/2024	2024-28
21	3070	Personnel	Continuity of Service	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-07
22	3075	Personnel	Reduction in Force	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-10
24	3085	Personnel	Holidays	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	2024-02
25	3090	Personnel	Vacation	Human Resources	Yes	1/18/2022	1/17/2023	1/17/2023	2/14/2024	2/14/2024	2/14/2024	2023-05
26	3095	Personnel	Sick Leave	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	2/18/2023	2/18/2023	2/18/2023	2023-05
N/A	3096	Personnel	Family and Medical Leave	Human Resources	Yes	10/2/2024	11/21/2024	11/21/2024	5/16/2024	5/16/2024	5/16/2024	2024-07
27	3100	Personnel	Pregnancy Disability Leave	Human Resources	Yes	9/1/2022	9/20/2022	9/20/2022	1/8/2025	1/8/2025	1/8/2025	2025-01
28	3105	Personnel	Lactation Accommodation	Human Resources	Yes	8/25/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	2022-43
29	3110	Personnel	Bereavement Leave	Human Resources	Yes	5/17/2022	5/17/2022	5/17/2022	12/14/2022	12/14/2022	12/14/2022	2022-43
N/A	3111	Personnel	Personal Leave of Absence	Human Resources	Yes	6/28/2024	7/16/2024	7/16/2024	6/8/2022	6/8/2022	6/8/2022	2022-19
30	3121	Personnel	Personal Leave of Absence	Human Resources	Yes	10/5/2023	10/17/2023	11/21/2023	8/14/2024	8/14/2024	8/14/2024	2024-12
31	3122	Personnel	Jury and Witness Duty	Human Resources	Yes	12/6/2024	2/18/2025	2/18/2025	12/13/2023	12/13/2023	1/10/2024	2023-31
32	3125	Personnel	Members, and Victims of Domestic	Human Resources	Yes	1/11/2023	1/17/2023	1/17/2023	3/11/2025	3/11/2025	3/11/2025	2025-08
33	3130	Personnel	Return to Work Policy	Human Resources	Yes	2/12/2023	2/18/2023	2/18/2023	2/18/2023	2/18/2023	2/18/2023	2023-05
34	3135	Personnel	Infectious Disease Control	Human Resources	Yes	2/2/2023	2/21/2023	2/21/2023	2/18/2023	2/18/2023	2/18/2023	2023-05
N/A	3136	Personnel	Workplace Violence	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	3/15/2023	3/15/2023	3/15/2023	2023-09
35	3140	Personnel	Uniforms and Protective Clothing	Human Resources	Yes	3/14/2023	3/21/2023	3/21/2023	2/14/2024	2/14/2024	2/14/2024	2024-02
36	3145	Personnel	Employee Training, Education and	Human Resources	Yes	6/29/2024	7/16/2024	8/20/2024	5/10/2023	5/10/2023	5/10/2023	2023-13
37	3150	Personnel	Occupational Certification and	Human Resources	Yes	6/14/2022	8/16/2022	8/16/2022	9/17/2022	9/17/2022	9/17/2022	2022-14
38	3151	Personnel	Succession and Workforce Planning	Human Resources	Yes	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-18
39	3160	Personnel	Respiratory Protection Program	Human Resources	Yes	6/29/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	2024-12
40	3170	Personnel	Driver Training and Record Review	Human Resources	Yes	10/2/2024	11/19/2024	11/19/2024	2/12/2025	2/12/2025	2/12/2025	2025-04
41	3175	Personnel	District Vehicle Usage	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	5/16/2024	5/16/2024	5/16/2024	2024-07
42	3180	Personnel	Personal Vehicle Usage	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	4/10/2024	4/10/2024	4/10/2024	2024-06
43	3185	Personnel	HIPAA Compliance and Security Officer	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	4/10/2024	4/10/2024	4/10/2024	2024-10
44	3200	Personnel	Smoke Free Workplace and Tobacco	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	7/10/2024	7/10/2024	7/10/2024	2024-06
45	3205	Personnel	Disciplinary Action or Terminations	Human Resources	Yes	6/29/2024	7/16/2024	7/16/2024	4/10/2024	4/10/2024	4/10/2024	2024-14
N/A	3206	Personnel	Transfers and Voluntary Demotion	Human Resources	Yes	9/10/2024	9/18/2024	9/18/2024	10/9/2024	10/9/2024	10/9/2024	2024-18
46	3215	Personnel	Nepotism-Employment of Relatives	Human Resources	Yes	7/12/2025	7/15/2025	7/15/2025	10/9/2024	10/9/2024	10/9/2024	2024-18
47	3215	Personnel	Employee Separation	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-10
48	3205	Personnel	Grievance Procedures	Human Resources	Yes	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	2024-10
N/A	3206	Personnel	Substance Abuse	Human Resources	No	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-16
50	3215	Personnel	FMCSA Clearinghouse Registration	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	2024-07
			Personnel Action Form (PAF)	Human Resources	Yes							

Priority Legend:
Yellow Highlight = Highest Priority
Light Blue Highlight = Lowest Priority

[illegible]

2 of 2



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 8

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: CalPERS Preliminary Health Premium Rates for Fiscal Year 2026 – Region 3 (Riverside, San Bernardino, and Los Angeles Counties)

Staff Recommendation

For informational purposes only.

Executive Summary

This report provides the preliminary CalPERS health insurance premium rates for Fiscal Year 2026, applicable to Region 3, which includes Riverside, San Bernardino, and Los Angeles Counties. These rates were presented during the CalPERS Pension and Health Benefits Committee (PHBC) meeting on June 17, 2025. Although these are preliminary figures, historical trends for the last 10 years have shown that 99% of the time, CalPERS adopts these same rates in mid-July without modification.

The final adoption of 2026 health premiums by the CalPERS Board of Administration is expected in mid-July 2025, following final reconciliation and negotiations with plan providers. The adopted rates will be effective January 1, 2026. This report supports early budget planning, forecasting, and employee education ahead of the annual Open Enrollment period from September 15 to October 9, 2025.

Background

Beaumont-Cherry Valley Water District provides comprehensive health benefits to eligible employees and retirees through the CalPERS Health Benefits Program. The District fully sponsors 100% of the monthly health insurance premiums for active employees, including coverage for their eligible dependents. For retirees, the District contributes a fixed monthly amount of \$474, in accordance with the provisions established under its 2002 contractual agreement with CalPERS. Health premium rates are reviewed and adjusted annually by CalPERS to account for actuarial projections, regional healthcare cost trends, and negotiated updates with health plan providers.

On June 17, 2025, CalPERS released the preliminary 2026 premium rates during the Pension and Health Benefits Committee meeting. These Region 3 rates apply to the District and offer reliable guidance for planning purposes. The final rates will be adopted following further review by the CalPERS Board in mid-July 2025, with new premiums taking effect on January 1, 2026.



Discussion

Tables 1 to 3 summarize the 2025 and 2026 monthly premiums for the CalPERS Basic (non-Medicare) plans available to Region 3 agencies, including the percent change year-over-year. These preliminary rates were released during the PHBC meeting and are pending final adoption.

Table 1 – Summary of Employee Only Health Plan Rates Comparison – 2025 v. 2026

Health Plan	2025 Rate	2026 Rate	% Increase
Anthem Blue Cross Select HMO	\$916.88	\$962.68	+5.00%
Anthem Blue Cross Traditional HMO	\$1,065.46	\$1,128.53	+5.92%
Blue Shield Access+ HMO	\$828.48	\$917.91	+10.79%
Blue Shield Trio HMO	\$738.11	\$852.56	+15.51%
Health Net Salud y Más	\$714.40	\$740.11	+3.60%
Kaiser Permanente	\$926.52	\$969.05	+4.59%
UnitedHealthcare Signature Value Alliance	\$866.40	\$870.76	+0.50%
UnitedHealthcare Signature Value Harmony	\$756.28	\$765.51	+1.22%
PERS Gold PPO	\$868.15	\$963.25	+10.95%
PERS Platinum PPO	\$1,263.73	\$1,435.47	+13.59%

Note: Rates are pending adoption by the CalPERS Board Administration Mid-July 2025

Table 2 – Summary of 2-Party Health Plan Rates Comparison – 2025 v. 2026

Health Plan	2025 Rate	2026 Rate	% Increase
Anthem Blue Cross Select HMO	\$1,833.76	\$1,925.45	+5.00%
Anthem Blue Cross Traditional HMO	\$2,130.92	\$2,257.07	+5.92%
Blue Shield Access+ HMO	\$1,656.96	\$1,835.75	+10.79%
Blue Shield Trio HMO	\$1,476.22	\$1,705.18	+15.51%
Health Net Salud y Más	\$1,428.80	\$1,480.24	+3.60%
Kaiser Permanente	\$1,853.04	\$1,938.09	+4.59%



Health Plan	2025 Rate	2026 Rate	% Increase
UnitedHealthcare Signature Value Alliance	\$1,732.80	\$1,741.46	+0.50%
UnitedHealthcare Signature Value Harmony	\$1,512.56	\$1,531.01	+1.22%
PERS Gold PPO	\$1,736.30	\$1,972.26	+10.95%
PERS Platinum PPO	\$2,527.46	\$2,804.22	+13.59%

Note: Rates are pending adoption by the CalPERS Board Administration Mid-July 2025

Table 3 – Summary of Family Health Plan Rates Comparison – 2025 v. 2026

Health Plan	2025 Rate	2026 Rate	% Change
Anthem Blue Cross Select HMO	\$2,383.89	\$2,503.08	+5.00%
Anthem Blue Cross Traditional HMO	\$2,770.20	\$2,934.20	+5.92%
Blue Shield Access+ HMO	\$2,154.05	\$2,386.47	+10.79%
Blue Shield Trio HMO	\$1,919.09	\$2,216.74	+15.51%
Health Net Salud y Más	\$1,857.44	\$1,924.31	+3.60%
Kaiser Permanente	\$2,408.95	\$2,519.52	+4.59%
UnitedHealthcare Signature Value Alliance	\$2,252.64	\$2,263.90	+0.50%
UnitedHealthcare Signature Value Harmony	\$1,966.33	\$1,990.32	+1.22%
PERS Gold PPO	\$2,257.19	\$2,563.94	+10.95%
PERS Platinum PPO	\$3,285.70	\$3,645.48	+13.59%

Note: Rates are pending adoption by the CalPERS Board Administration Mid-July 2025

Average Premium Increases for Region 3 Plans:

- HMO Plans: **5.97%**
- PPO Plans: **12.27%**

As of June 30, 2025, the District has 46 individuals (including dependents) enrolled in CalPERS health plans that are 100% District-sponsored. Based on current enrollment:

- The average monthly cost for HMO enrollees (including dependents) is **\$1,860**
- The average monthly cost for PPO enrollees (including dependents) is **\$2,780**
- The overall average monthly cost across all enrollees (including dependents) is **\$1,920**



These figures assist in forecasting costs and preparing for any necessary financial adjustments ahead of Open Enrollment in September-October 2025, and FY 2026 implementation.

Fiscal Impact

If staffing levels and employee health plan selections remain consistent through Fiscal Year 2026, the estimated increase in health benefits costs is projected at 9.54%, based on the preliminary 2026 premium rates. This estimate is derived from current enrollment trends and incorporates anticipated rate adjustments from the preliminary Region 3 CalPERS data.

While this report does not result in an immediate fiscal impact, the final adoption of CalPERS premium rates (anticipated in mid-July 2025), along with employees' health plan selections during the Open Enrollment period in September–October 2025, will allow staff to refine cost projections. The finalized figures will be formally incorporated into the District's FY 2026 budget planning process by the Department of Finance and Administration.

Attachment:

1. Regional 2026 Preliminary Health Premiums Per Subscriber Per Month (PSPM) _
Region 3

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager

Attachment 1

Regional 2026 Preliminary Health Premiums Per Subscriber Per Month (PSPM) Public Agency & School Members												
	Region 1			Region 2			Region 3			Out of State Region		
	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025
Basic Plan												
Anthem Blue Cross Select HMO	\$1,256.65	\$1,336.29	6.34%	\$919.00	\$1,016.32	10.59%	\$916.88	\$962.68	5.00%	N/A	N/A	
Anthem Blue Cross Traditional HMO	\$1,500.40	\$1,612.08	7.44%	\$1,110.97	\$1,158.26	4.26%	\$1,065.46	\$1,128.53	5.92%	N/A	N/A	
Blue Shield Access+ HMO w/ Monterey	\$1,170.17	\$1,301.95	11.26%	\$948.53	\$1,052.89	11.00%	\$828.48	\$917.91	10.79%	N/A	N/A	
Blue Shield Access+ EPO	\$1,170.17	\$1,301.95	11.26%	\$948.53	\$1,052.89	11.00%		N/A		N/A	N/A	
Blue Shield Trio HMO	\$1,134.79	\$1,166.58	2.80%	\$909.10	\$936.58	3.02%	\$738.11	\$852.56	15.51%	N/A	N/A	
Health Net Salud y Más		N/A		\$823.49	\$879.57	6.81%	\$714.40	\$740.11	3.60%	N/A	N/A	
Kaiser Permanente	\$1,112.90	\$1,168.86	5.03%	\$944.34	\$987.69	4.59%	\$926.52	\$969.05	4.59%	N/A	N/A	
Kaiser Permanente Out of State		N/A			N/A			N/A		\$1,422.26	\$1,388.96	(1.64%)
Sharp Performance Plus			N/A	\$868.45	\$916.20	5.50%		N/A		N/A	N/A	
UnitedHealthcare SignatureValue Alliance	\$1,184.58	\$1,290.06	8.90%	\$890.66	\$950.99	6.77%	\$866.40	\$870.76	0.50%	N/A	N/A	
UnitedHealthcare SignatureValue Harmony	\$1,005.02	\$1,133.09	12.74%	\$819.64	\$857.14	4.58%	\$756.28	\$765.51	1.22%	N/A	N/A	
Western Health Advantage HMO	\$914.27	\$969.58	6.05%		N/A			N/A		N/A	N/A	
	Region 1			Region 2			Region 3			Out of State Region		
	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025	2025 Premium	2026 Premiums	Percent Change from 2025
Basic Plan												
PERS Gold	\$1,013.70	\$1,122.04	10.69%	\$864.75	\$959.54	10.96%	\$868.15	\$963.25	10.95%	N/A	N/A	
PERS Platinum	\$1,476.10	\$1,672.91	13.33%	\$1,258.76	\$1,429.92	13.60%	\$1,263.73	\$1,435.47	13.59%	\$1,244.55	\$1,414.02	13.62%



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
July 15, 2025**

Item 9

2025 RISK MANAGEMENT SECOND QUARTER REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: 2025 Risk Management Report for Second Quarter – April to June

Staff Recommendation

Receive and file, or direct staff as desired. This does not need to go to the full Board unless further directions are given.

Executive Summary

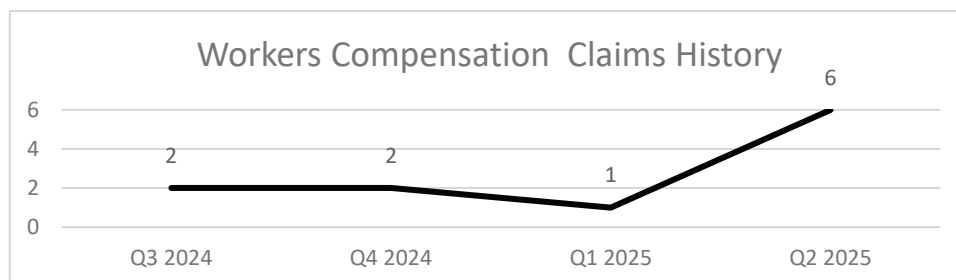
At its February 18, 2025 meeting, the Personnel Committee received the Fiscal Year (FY) 2025 Human Resources (HR) and Risk Management Report and directed staff to begin providing quarterly updates on risk management trends and mitigation efforts.

Discussion

HR and Risk Management staff, in collaboration with District Legal Counsel and ACWA-JPIA, plays a pivotal role in risk management at the District, proactively addressing potential challenges to ensure a safe and compliant work environment. Key risk areas include workers' compensation claims, property loss and damage claims, and liability claims against the District. Through strategic oversight and preventive measures, HR and Risk Management Department continues to mitigate risks while fostering a culture of safety and accountability.

Table 1 – Second Quarter 2025 Workers Compensation Claims

	Case	Department/s	Status	Date
1	Ankle Injury	Operations	First Aid Only	May 7, 2025
2	Deep Cut (Fingers)	Operations	Medical Treatment	May 22, 2025
3	Lower Back Injury	Operations	Medical Treatment	June 9, 2025
4	Heat Exhaustion	Operations	Medical Treatment	June 24, 2025
5	Heat Stress	Operations	First Aid	June 27, 2025
6	Lower Back Injury	Operations	Medical Treatment	June 30, 2025





Occupational Injury Mitigation Efforts:

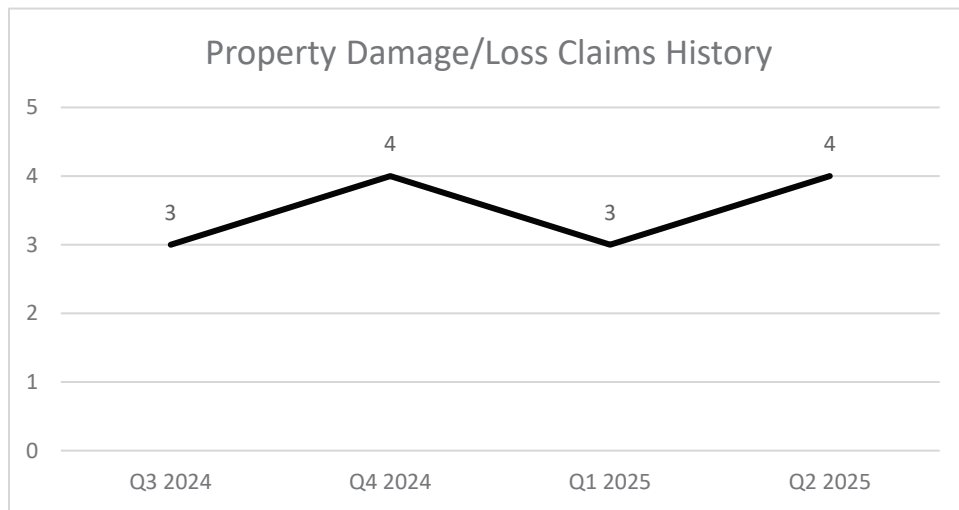
In response to recent incidents involving ankle and lower back injuries, the Human Resources (HR) Department implemented an in-house safety training focused on Field Ergonomics for Safety-Sensitive Staff. This session was held on May 29, 2025, with the goal of preventing similar injuries in the future.

Although a Heat Illness Prevention training was conducted for Field Staff on June 19, 2025, an incident involving heat exhaustion occurred shortly thereafter. With the onset of the warmer season, HR collaborated with the Safety Compliance Company to facilitate an all-staff Heat Illness Prevention training scheduled for July 3, 2025.

To reinforce safe work practices and reduce the risk of occupational injuries, HR also conducted refresher training sessions with the employees involved in the prior incidents. These sessions emphasized the importance of adhering to safety protocols. Each training was documented with acknowledgment forms signed by the trainees and affirmed by their respective Department Heads.

Table 2 – Second Quarter 2025 Property Loss or Damage Claims

	Case	Involved Party	Incident Location	Date
1	District Vehicle No. 10	Employee	12 th and Palm Ave.	April 2, 2025
2	District Vehicle No. 52	Employee	Orchard Ave.	May 6, 2025
3	District Vehicle No. 51	Employee	12 th and Palm Ave.	May 19, 2025
4	Hit Fire Hydrant	External	Palm Ave.	May 26, 2025





Property Damage Mitigation Efforts:

Due to the alarming rise in incidents involving employees operating District vehicles, the District has implemented a series of enhanced driver safety measures. In addition to the upcoming in-house Defensive Driving training scheduled for September 2025, employees involved in these incidents were required to attend refresher training sessions facilitated by the Human Resources Department. These sessions reinforce safe driving practices and emphasize the importance of adherence to District policies.

To ensure accountability and further reduce risks, the District has increased the monitoring of employee driving behavior. Additionally, on May 25, 2025, Supervisors completed Reasonable Suspicion Training in alignment with Department of Transportation (DOT) guidelines. This training equips supervisors with the skills to recognize and appropriately respond to signs of employee impairment, including potential influence from prohibited substances.

The overarching objective of these initiatives is to foster responsible vehicle operation, minimize preventable accidents, and protect the safety of both employees and the public.

The District will also continue to enhance situational awareness by identifying and mapping frequent incident locations. These areas will be marked as high-risk zones in GIS systems or flagged in work orders to alert field staff. Additionally, a brief safety assessment will be reinforced to all staff members before moving vehicles or starting work at a site.

Table 3 – Claims Against the District and Litigations

	Type of Case	Case Status	Date of Disposition	Cost Associated with Claims
1	Claims for Financial Loss	Ongoing with District Legal Counsel	June 5, 2025	Pending Court Decision
2	Midge Infestation	The District rejected the claim. ACWA JPIA denied the insurance claim. No feedback to date.	No feedback from claimant as of March 24, 2025.	None
3	Claims for Business Loss	Pending signed claim form from the claimant.	Ongoing	Potential \$250-\$500
4	Claim for Property Damage (Tree Damage)	District approved the removal of the trees pending pipeline project at 12 th and Palm Office	Ongoing	\$4,900
5	Claim for Property Damage (Driveway Cracks)	District negotiated reimbursing the claimant with \$1,500	June 30, 2025	\$1,500



Fiscal Impact

There is no fiscal impact to the District's Workers' Compensation program, as all associated costs are fully covered under the ACWA JPIA blanket policy. Furthermore, the incident did not result in any lost time, aside from the employee attending follow-up medical appointments, thereby avoiding any significant disruption to operations or increase in operating costs. The employee involved in the Workers' Compensation claim was placed on a restricted duty schedule and remained actively at work with minimal interruption.

The fiscal impact of property damage claims involving District employees is determined by the cost per incident, provided it falls below the \$10,000 deductible established by ACWA JPIA. For District vehicle repairs, expenses for this quarter were estimated to an aggregate cost of \$12,000. These repair costs are accounted for within the District's annual budget.

The fiscal impact of claims filed against the District reflects the total amount approved for corrective actions, as recommended by Legal Counsel. The aggregate cost associated with the resolved cases for this quarter amounts to \$6,400.

Staff Report Prepared by Ren Berioso, Human Resources and Risk Manager



**Beaumont-Cherry Valley Water District
Personnel Committee
July 15, 2025**

Item 10

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources and Risk Manager

SUBJECT: **Launch of the 2025 Annual Engagement Survey Through Great Place to Work**

Staff Recommendation

For informational purposes only.

Executive Summary

The District has officially launched its Annual Employee Engagement Survey through its vendor, Great Place to Work, as part of its ongoing commitment to cultivating a thriving organizational culture. The survey opened on Monday, July 1, 2025, at 8:00 AM and will remain available through Wednesday, July 31, 2025, until 5:00 PM. This year, 45 full-time, regular employees are eligible to participate.

The District continues to demonstrate strong employee engagement with a reported Engagement Score of 82% for the year 2024, a steady improvement from 81% in 2023 and 76% in 2022. While this score does not place the District among the Top 100 Small and Medium-Sized Companies in the United States, where average scores range between 95–97%, the upward trend affirms progress and provides actionable insight.

Background

For the fourth consecutive year, the District has been certified as a Great Place to Work through its annual engagement survey. This survey benchmarks results against a national dataset of over 3,120 U.S. small and medium-sized companies and provides valuable insights into key areas such as leadership, organizational culture, teamwork, job satisfaction, work-life balance, compensation and benefits, communication, career growth opportunities, and employee support.

Discussion

As of 2024, the District's employee engagement survey highlighted several key strengths, including a strong sense of camaraderie among staff, organizational stability, a commitment to gender equality, a dedication to social responsibility, and flexibility in time-off policies.

The survey also identified several areas for improvement, to which the District has proactively responded with targeted initiatives and strategic actions:

1. **Compensation & Fairness:** Addressed through a District-wide salary survey completed January 1, 2025 showing 90% of employees' salaries are now benchmarked with market standards.



2. **Benefits:** Enhancements include expanded wellness programs and work-life balance support via FunEx discount offerings and a new Planet Fitness membership partnership.
3. **Pride:** Reinforced through various employee-led appreciation and outreach events.
4. **Transparency:** Although not critically low, the District acknowledges the need to improve credibility and communication, and is focused on fostering open dialogue and leadership accessibility.

Fiscal Impact

The cost associated with conducting the survey includes a vendor fee of \$3,854 paid to Great Place to Work, along with the employee participation costs, which are reflected in the hourly wages of staff who take part in the survey. All associated expenses have been fully accounted for within the District's approved Annual Operating Budget.

Attachment

None.

Staff Report prepared by Ren Berioso, Human Resources and Risk Manager