



CIVIL SERVICE BOARD MEETING AGENDA

Date: November 15, 2018

OPEN SESSION 5:30 p.m.

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS: Chair, Andrea Gourdine; Vice Chair, David Jones; Lauren Baranco; Yvonne Hudson-Harmon; Christopher Johnson; Carmen Martinez; Beverly A. Williams

STAFF TO THE BOARD: Ian Appleyard, HRM Director/Secretary to the Board
Greg Preece, HRM Manager/Staff to the Board
Tabitha Pulliam, HRM Technician/Staff to the Board
Michelle Meyers, Senior Deputy City Attorney

OPEN SESSION AGENDA

ROLL CALL

1) OPEN FORUM

1a) Updates: Secretary to the Board

2) CONSENT CALENDAR:

ACTION

a) Approval of Employee Requests for Leave of Absence

- Public Works Department

b) Approval of Revised Classification Specifications

- Construction and Maintenance Supervisor I and Construction and Maintenance Supervisor II
- Deputy Director/Building Official
- Fire Marshal, Assistant (Sworn)
- Real Estate Agent

3) OLD BUSINESS:

- a) Approval of October 18, 2018 Civil Service Board Meeting Minutes ACTION
- b) Determination of Schedule of Outstanding Board Items INFORMATION
- c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDE's and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 INFORMATION
- d) Update on Common Classification Study - Human Resources Classes and Accounting & Budget Classes– Koff & Associates INFORMATION

4) NEW BUSINESS:

- a) Semi-Annual Informational Report on Budgeted Vacant Positions through September 24, 2018 INFORMATION

5) ADJOURNMENT

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, December 20, 2018. All materials related to agenda items must be submitted by Thursday, December 6, 2018. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandca.gov



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email civilservice@oaklandca.gov or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico civilservice@oaklandca.gov o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 civilservice@oaklandca.gov 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



MEMORANDUM

DATE: November 15, 2018

TO: The Honorable Civil Service Board

FROM: Tabitha Pulliam, HRM Technician, Recruitment & Classification / Staff to the Board

THROUGH: Ian Appleyard, HRM Director / Secretary to the Board

SUBJECT: Request Authorization for Employee Requests for Leave of Absence

HRM is in receipt of two (2) Unpaid Leave of Absence requests pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

Employee Name	Classification	Department	Leave Duration	Category
Stern, Jennifer	Program Analyst II	Public Works	November 3, 2018 – November 2, 2019	CSR 8.07 (c)(v) Exempt Position
Williams, Joseph	Equipment Services Superintendent	Public Works	November 3, 2018 – November 3, 2019	CSR 8.07 (c)(v) Exempt Position

RECOMMENDATION:

Staff recommends that the Civil Service Board approve the requested Leaves of Absence.

Print Form



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Jennifer Stern Employee's ID 22240 Today's Date 10/25/2018

Department/Division OPW / ESD Employee Job Title Program Analyst II

Request: Days Hours From 11/3/18 To 11/2/19
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No*	Parental Leave (no pay)

* Additional Information

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

Jennifer Stern
Employee's Signature 10/25/2018
Date

Civil Service Board Approval Date

[Signature]
Department Head Approval 11/9/18
Date

City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Joseph Williams Employee's ID 7047 Today's Date 10/4/2018

Department/Division OPW/BMIS/ESD Employee Job Title Equip. Svcs. Superintendent

Request: 365 Days Hours From 11/3/2018 To 11/3/2019
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No *	Parental Leave (no pay)

* Additional Information

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

KEE
10-5-2018

Joseph A. Williams 10/4/2018
Employee's Signature Date

Civil Service Board Approval Date

[Signature] _____
Department Head Approval Date

City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

Distribution: Original to DHRM Admin., Copy to HRIS Operations, Dept., and Employee



MEMORANDUM

DATE: November 15, 2018

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Greg Preece, Human Resources Manager, Recruitment & Classification

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specifications for Construction and
Maintenance Supervisor I and Construction and Maintenance Supervisor II

Based upon a classification review at the request of the Oakland Public Works Department, staff has proposed revisions to the **Construction and Maintenance Supervisor I** and **Construction and Maintenance Supervisor II** classification specifications. The classification specifications were established in April 1995 and have not been revised since that time.

A variety of minor revisions were proposed throughout the classification specifications to update and/or refine the content to ensure the representations are accurate and current. The most significant changes involve adding new desirable (not required) qualifications such as previous lead experience under the Experience section on the Construction and Maintenance Supervisor I and completion of the American Public Works Association's modules 1-4 under the License or Certificate sections on both classification specifications.

There are three vacancies at the Construction and Maintenance Supervisor I level and none at the II level. The revised classification specifications will be used to fill future vacancies.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City staff and union representatives met on September 20, 2018 and October 18, 2018 regarding the changes. In an email dated October 25, 2018, the union confirmed that they have no objections to the proposed revisions.

Additionally, no determination has been rendered regarding the "common class" status of these classifications. The "Common Class" Project is currently underway, and more information will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed revisions to the **Construction and Maintenance Supervisor I** and **Construction and Maintenance Supervisor II** classification specifications.

Attachments: Revised draft Construction and Maintenance Supervisor I and Construction and Maintenance Supervisor II classification specifications.



CONSTRUCTION AND MAINTENANCE SUPERVISOR I

DRAFT

Class Code: SC124 FTE Civil Service

DEFINITION

Under general supervision in the Oakland Public Works Department, To plans and oversees; supervise, assign and evaluate the work of skilled crafts workers and laborers in the construction and maintenance of the City's buildings, furniture, facilities, and recreational equipment; keeps records; prepares reports; supervises, trains, and evaluates assigned staff; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

~~Construction and Maintenance Supervisor I~~ This is a first journey level supervisory classification in the Construction and Maintenance series. Incumbents perform a variety of supervisory duties involving the construction and maintenance of the City's buildings, furniture, facilities, and recreational equipment. Duties include scheduling and supervision of construction and maintenance projects. Incumbents are expected to use professional judgment and skill in the performance of assignments which are subject to review by professional superiors. This classification differs from Construction and Maintenance Supervisor II in that incumbents of the latter are second level supervisors expected to performing highly complex assignments with only occasional instruction or assistance with work reviewed only on completion and for overall results.

SUPERVISION RECEIVED AND EXERCISED

Incumbents rReceives general supervision from the Construction and Maintenance Supervisor II or other management staff and -

Eercises supervision over skilled crafts workers and laborers.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

Plan, schedule, Assign, and supervise and evaluate staff who are responsible for in the construction and maintenance of the City's buildings, furniture, facilities, and recreational equipment.

Operate a motor vehicle in the performance of assigned duties.

Promote and enforce safety standards.

Evaluate buildings, facilities, furniture, and recreational equipment to determine type and amount of materials and labor needed; make recommendations for improvements.

Prepare service requests in the computerized maintenance management systems complete service request forms for each project; maintain records and reports.

Schedule and implement an annual plan for construction and maintenance projects.

Inspect completed projects to ensure compliance with departmental quality standards.

Select and order tools and materials needed for each project.

Supervise aspects of the project which require technical expertise to obtain the desired result.

Prepare budget estimates for projects; adhere to project budgets; employ cost control measures.
Supervise, train, motivate, and evaluate subordinate staff; initiate disciplinary action as necessary.

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES QUALIFICATIONS

Knowledge of:

- Methods, material, equipment, and tools used in the construction, repair, alteration, and maintenance of buildings, facilities, furniture, and recreational equipment.
- Principles of supervision, training, and evaluation.
- Building codes.
- Safety principles, practices, and procedures.
- Cost estimating methods for project materials and labor.
- Basic report writing.
- Basic arithmetic.
- Budget monitoring and control.
- Computer systems and software applications, including maintenance management systems.

Ability to:

- Supervise, train, and evaluate assigned staff.
- Promote and enforce safe work practices.
- Interpret and apply building codes and departmental policy.
- Read and interpret blue prints.
- Prepare project cost estimates.
- Prepare and administer a project budget.
- Prepare reports; maintain records.
- Communicate effectively in both oral and written form.
- Utilize computer systems and software applications, including maintenance management systems.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS EXPERIENCE AND EDUCATION

Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:
Any combination of education and experience that is equivalent to the following minimum

qualifications is acceptable.

Education:

High school diploma or eEquivalent to the completion of the twelfth grade. College level coursework in supervision or management at an accredited college or university is highly desirable.

Experience:

Six (6) years of progressively responsible experience at a skilled or journey level in one or more of a variety of construction trades including carpentry, plumbing, painting, and mechanical systems. Previous lead experience is desirable.

LICENSE OR CERTIFICATE

Successful incumbents in this position are expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

Completion of the American Public Works Association (APWA) Public Works Institutes modules 1-4 is highly desirable.

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY			
Established:	04/27/1995	CSB Resolution #:	44336
Exempted:	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>	Exemption Resolution #:	
Revision Date:		CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	
(Previous title(s):)	Salary Ordinance #:	



CONSTRUCTION AND MAINTENANCE SUPERVISOR II

DRAFT

Class Code: MA112 FTE Civil Service

DEFINITION

Under general supervision in the Oakland Public Works Department, To plans, directs, and monitors the crews responsible for construction and maintenance of the City's buildings, furniture, facilities, and recreational equipment; supervises, trains, and evaluates assigned staff; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

~~Construction and Maintenance Supervisor II~~ This is the ~~advanced-second~~ level supervisory classification in the Construction and Maintenance series. Incumbents perform a variety of professional duties involving the supervision of Construction and Maintenance Supervisor I's. Duties include planning and directing the annual plan and assisting in the development of policies and procedures. Incumbents are expected to use professional judgment and skill in the performance of assignments which are subject to review by professional superiors. This classification differs from the division manager in that the latter manages the entire facility improvement program and establishes policy guidelines for the division. It is further distinguished from the Construction and Maintenance Supervisor I in that incumbents of the latter are first level supervisors performing assignments of a less complex nature within a framework of established procedures and provide daily oversight to assigned staff.

~~SUPERVISION RECEIVED AND EXERCISED~~

Incumbents rReceives direction from the ~~Construction and Maintenance Superintendent~~Public Works Operations Managers or other management staff and -

~~E~~exercises general supervision over Construction and Maintenance Supervisor Is.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

Perform short and long range planning for all construction and maintenance activities; assist in the development of departmental policies and procedures for construction and maintenance projects.

Operate a motor vehicle in the performance of assigned duties.

Develop and adhere to an annual plan for construction and maintenance projects.

Plan and direct the construction and maintenance work on City buildings, facilities, furniture, paved areas, grounds, drainage and water systems, and recreational equipment.

Assign, train and monitor the performance of work crews involved in routine, emergency, and occasional construction and maintenance projects.

Review service requests; approve cost estimates for materials and labor.

Monitor and approve billable work orders.

Inspect completed projects to ~~en~~assure compliance with departmental quality standards and codes.

Select and supervise outside contractors.

Coordinate scheduling with other City departments and outside agencies.

Develop unit budget based on project estimates; monitor unit and project budgets.

Solve highly technical or complex problems.

Prepare and maintain records and reports.

Supervise, train, motivate, and evaluate subordinate staff; recommend disciplinary action as necessary.

Perform related duties as assigned.

QUALIFICATIONS KNOWLEDGE AND ABILITIES

Knowledge of:

- Practices, methods, materials, equipment, and tools used in the construction, repair, alteration, and maintenance of buildings, facilities, furniture, and recreational equipment.
- Principles of supervision, training, and evaluation.
- Building codes and related regulations.
- Safety principles, practices, and procedures.
- Cost estimating methods for project materials and labor and inventory control.
- Basic report writing.
- Basic arithmetic.
- Budget development and administration.
- Computer systems and software applications, including maintenance management systems.

Ability to:

- Schedule and coordinate project and other work tasks
- Supervise, train, and evaluate assigned staff, including contractors.
- Promote and enforce safe work practices.
- Interpret and apply building codes and departmental policy.
- Read and interpret blue prints.
- Prepare and project cost estimates.
- Prepare and administer a unit budget.
- Prepare reports of a complex or technical nature; maintain records.
- Communicate effectively in both oral and written form.
- Utilize computer systems and software applications, including maintenance management systems.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS EXPERIENCE AND EDUCATION

~~Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:~~
Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

Education:

A ~~B~~achelor’s degree from an accredited college or university in management, construction management, public administration or related field.

Experience:

Three (3) years of progressively responsible experience comparable to a Construction & Maintenance Supervisor I in the City of Oakland.

LICENSE OR CERTIFICATE

Successful incumbents in this position are expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver’s License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

Completion of the American Public Works Association (APWA) Public Works Institutes modules 1-4 is highly desirable.

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY			
Established:	04/27/1995	CSB Resolution #:	44336
Exempted:	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>	Exemption Resolution #:	
Revision Date:		CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	
(Previous title(s):)	Salary Ordinance #:	



CITY OF OAKLAND

MEMORANDUM

DATE: November 15, 2018

TO: The Honorable Civil Service Board

FROM: Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Greg Preece, Human Resources Manager, Recruitment & Classification

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specification for Deputy Director/Building Official

Based upon a classification review at the request of the Planning and Building Department, staff has proposed revisions to the **Deputy Director/Building Official** classification specification. The classification specification was officially established in February 2011 but had existed as a working draft for decades prior.

The following modifications to the classification specification were proposed:

1. Correct all references to the title of the department, name of the bureau, and reporting structure.
2. Make minor revisions to the Knowledge and Abilities section.
3. Broaden the Education requirement to include architecture as a major and add that a Master's Degree is highly desirable.
4. Increase the Experience requirement to include two additional years of experience that must be at the supervisory level, add architecture as a possible background, and better describe the relevant and qualifying experience.
5. Under License or Certificate, add Registration as a Professional Architect as a possible certification and change the language such that either Registration (Professional Civil Engineer or Professional Architect in the State of California) is now highly desirable instead of required.
6. Add a new highly desirable certification under License or Certificate - possession of a certification from the International Code Council (ICC) as a Certified Building Official.

There is one vacancy. The revised specification will be used to initiate an exempt hiring process in the near future.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City staff and union representatives met on September 20, 2018 and October 18, 2018 regarding the changes. In an email dated October 25, 2018, the union confirmed that they have no objections to the proposed revisions.

Additionally, no determination has been rendered regarding the "common class" status of this classification. The "Common Class" Project is currently underway, and more information will be available at a later date.

CIVIL SERVICE BOARD

Subject: Deputy Director/Building Official Classification Specification

Date: November 15, 2018

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Staff recommends that the Civil Service Board approve the proposed revisions to the **Deputy Director/Building Official** classification specification.

Attachments: Revised draft Deputy Director/Building Official classification specification.



DEPUTY DIRECTOR, BUILDING OFFICIAL

Class Code: EM143 FTE

Exempt

DEFINITION

Under administrative direction in the ~~Community & Economic Development Agency (CEDA),~~ Planning and Building Department (PBD), uses operational decision making in the direction and coordination of work in the Building ~~Services--~~ DivisionBureau; plans, organizes, manages, and directs the review and implementation of the City's major Building ~~Services~~ DivisionBureau projects; trains and supervises assigned staff; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

~~This Deputy Director, Building Official~~ is a ~~division-bureau~~ head position with responsibility for the overall administration of the Building ~~Services~~ DivisionBureau. Pursuant to the Oakland Charter 902(fb) and Oakland Municipal Code, this position is exempt from the regulations of the Civil Service Board. This classification is distinguished from the ~~Agency Director, Community and Economic Development~~ Director of Planning and Building, which is responsible for overseeing all bureaus and divisions of ~~CEDA PBD~~.

The incumbent receives administrative direction from the Director of Planning and Building or other management staff ~~Agency Director, Community and Economic Development~~ and exercises direction over managers, supervisors, and other professional, technical, and clerical staff in the Building ~~Services~~ DivisionBureau.

EXAMPLES OF DUTIES - Duties may include, but are not limited to the following:

Plan, direct, and coordinate, through subordinate supervisors, a variety of building services programs including, building, housing and zoning code compliance and enforcement, inspection services, engineering services, permit processing, plan review, and seismic safety.

~~P~~; plan, organize, and implement improved permit and enforcement systems to provide timely and efficient customer services.

~~S~~erve as Building Official for the City of Oakland.

~~C~~oordinate and direct program activities with other departments, outside agencies, and concerned citizens to resolve complex building services issues.

~~d~~Develop and implement goals, objectives, policies, procedures, and work standards to enhance the delivery of building services and to ensure administrative accountability; develop and implement management systems, procedures, and standards for program evaluation.

~~D~~irect the preparation of complex studies and reports relating to current and long-range building services issues and formulate specific proposals to address them.

~~D~~irect the preparation and administration of the division-bureau budget.

~~D~~irect the selection, supervision, and ~~work~~ evaluation of division-assigned staff; plan and implement staff training and development to enhance program effectiveness.

Deputy Director, Building Official

Page 2

~~P~~; prepare or review reports for the City Administrator, City Council or commissions; work closely with Council and other public and private groups to explain or coordinate program activities or plans for proposed projects and to respond to their concerns.

~~M~~; ~~and~~ monitor developments related to building services program areas, evaluate their impact on City operations, and recommend or implement policy and procedure improvements.

KNOWLEDGE AND ABILITIES

Knowledge of:

- ~~the~~ Principles and practices of civil engineering, building design, and construction.
- ~~F~~ederal, state and city codes, regulations and ordinances governing building, housing, and zoning.
- ~~E~~ngineering standards and legal guidelines for building projects, code compliance, plan check, and seismic safety.
- ~~M~~unicipal government and organization.
- ~~A~~administrative principles and methods, including goal setting, program development, and implementation ~~and employee supervision~~.
- ~~P~~; ~~the~~ principles and practices of budget development and administration.
- Principles of personnel management, training, and evaluation.
- ~~C~~; ~~and~~ computer systems and software applications ~~related to the work~~.

Ability to:

- ~~m~~Manage and direct a comprehensive building services program.
- ~~A~~ssess, develop, and manage appropriate organizational and staffing structures.
- ~~P~~; plan, organize, direct, and coordinate a variety of functional specialties with overlapping work areas.
- ~~S~~; select, motivate, ~~and~~ evaluate, and supervise staff; ~~and~~ provide for their training and professional development.
- ~~A~~; analyze complex technical and administrative building services problems, evaluate alternative solutions, and recommend or adopt effective courses of action.
- ~~D~~; develop and implement goals, objectives, policies, procedures, work standards, and internal controls.
- ~~C~~ommunicate effectively orally and in writing.
- ~~P~~; prepare clear and concise reports, correspondence, and other written materials.
- ~~E~~xercise sound independent judgment within general policy guidelines.
- Prepare and administer a budget; assist with negotiating and administering a variety of contracts.
- Utilize computer systems and software applications.
- ~~;~~ ~~and~~ ~~E~~establish and maintain effective work~~ing~~ relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS

The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification.

Education:

Deputy Director, Building Official

Page 3

A Bachelor's degree from an accredited college or university in civil engineering, **architecture** or a closely related field. A Master's Degree in a related field is highly desirable.

Experience:

~~At least Five (5) Three~~ years of progressively responsible management experience in engineering, **architecture**, code compliance, and enforcement or inspection work, including program administration, policy development, and project management. Must include two (2) years of supervisory experience.

LICENSE OR CERTIFICATE

Possession of a Certificate of Registration as a Professional Civil Engineer in the State of California or Registration as a Professional Architect in the State of California is highly desirable~~required~~.

Possession of a certificate from International Code Council (ICC) as a Certified Building Official is highly desirable.

Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY

Established: [2/10/2011 CSB Resolution #: 44353 Salary Ordinance
#:

Exempted: Y N Exemption Resolution #: 902(~~fb~~)

Revision Date: / / CSB Resolution #:
Re-titled Date: / / CSB Resolution #: Salary Ordinance
#:

(Previous title(s): n/a)



CITY OF OAKLAND

MEMORANDUM

DATE: November 15, 2018

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Greg Preece, Human Resources Manager, Recruitment & Classification

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specification for Fire Marshall, Assistant
(Sworn)

Based upon a classification review at the request of the Oakland Fire Department, staff has proposed revisions to the **Fire Marshall, Assistant (Sworn)** classification specification. The classification specification was last revised in August 2017.

A variety of changes have been proposed:

1. A clarifying statement about the role of this position has been added to the Distinguishing Characteristics section.
2. In the Education section of the Minimum Qualifications, Fire Prevention Officer courses 1A-1D are reflected as required to align with existing requirements.
3. In the Experience section of the Minimum Qualifications, the required experience is changing from the previously required three years to four years. The relevant domains of sworn fire experience are being broadened to newly include backgrounds in fire protection, suppression, code enforcement, investigation, and fire education to supplement the existing domains. Further, two years of supervisory experience is being included as highly desirable, which modifies the previous language that lead or supervisory experience was desirable.
4. Under the License and Certification section, the statement about obtaining a certification by the completion of probation has been amended to reflect prior to completion of probation.
5. Lastly, in the License and Certification section, the Fire Prevention Officer I-III series has been replaced with the Fire Inspector series 2A-2D and remains desirable.

There is one vacancy. The revised specification will be used to initiate a recruitment and selection process in the near future.

The International Association of Fire Fighters (IAFF, Local 55) was notified of the proposed classification specification revisions. In an email dated October 10, 2018, the union opted not to meet about the changes. There are no objections to the proposed revisions.

The Port does not operate any fire services programs. Therefore, classifications specifically designed for that program have no corresponding classification at the Port. This classification is not being considered as part of the "Common Class" Project that is currently underway.

CIVIL SERVICE BOARD

Subject: Fire Marshal, Assistant (Sworn) Classification Specification

Date: November 15, 2018

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Staff recommends that the Civil Service Board approve the proposed revisions to the **Fire Marshal, Assistant (Sworn)** classification specification.

Attachments: Revised draft Fire Marshal, Assistant (Sworn) classification specification.



FIRE MARSHAL, ASSISTANT (Sworn)

Class Code: PS140 (Sworn)

Civil Service Classified

DEFINITION

Under general direction in the Oakland Fire Department, plan, organize, assist and direct day-to-day activities within the Fire Prevention Division, which is responsible for fire prevention, investigation, and commercial inspections. The Sworn Assistant Fire Marshal performs a variety of administrative, technical and supervisory tasks related to vegetation management, environmental hazards, fire code inspection, fire investigation, engineering services, and fire suppression; and performs other related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This is a supervisory-level classification in public safety. The Sworn Assistant Fire Marshal is a supervisor who exercises independent judgment in interpreting complex code requirements and conducting fire investigations. The Assistant Fire Marshal receives direction from the Fire Marshal and provides supervision to the Vegetation Management Supervisor, Fire Investigators, and other professional, technical and support staff as assigned. The Sworn Assistant Fire Marshal is distinguished from the Non-Sworn Assistant Fire Marshal in that the Sworn Assistant Fire Marshal is trained and expected to participate in emergency fire suppression activities when needed. Additionally, the Sworn Assistant Fire Marshall serves as the primary liaison between sworn staff assigned to the Operations Bureau and the Fire Prevention Division.

EXAMPLES OF DUTIES - Duties may include, but are not limited to the following:

Plan, develop, implement, and direct a wild land urban interface fire protection program within the Wildfire District.

Oversee and manage the vegetation management and commercial inspection programs; develop training, standard operating procedures, and educational materials for the vegetation management and commercial inspection programs.

Plan, organize, assist and direct day-to-day activities in a division within the Fire Prevention Division; responsible for formulating and interpreting policies and procedures; assist with developing goals and objectives; supervise and train staff and sworn fire personnel; provide data for developing and administering a division budget; develop and review reports; represent the department in public forums.

Oversee Fire Department commercial and vegetation inspection programs; inspect existing structures for vegetation and fire code standards; participate in the review and evaluation of construction plans for code compliance; inspect construction and remodel sites for compliance with fire codes; confer with property and business owners, contractors and appropriate staff to resolve compliance problems.

Prepare written reports citing code violations and fire hazards; recommend corrective actions; conduct follow-up inspections to determine if corrective actions have been taken; issue notice of violations and citations for fire code violations; issue burn permits; renew fire code permits.

Coordinate fire related code review and approval of occupancy permits and business licenses with building officials.

Conduct the inspection of hydrants, sprinkler systems and other fire extinguishing and protection tools/systems.

Oversee the investigation of major fires, fires of suspicious origin or those which involve loss of life; search fire scene for physical evidence.

Plan, schedule, support, and participate in providing a broad range of public education to groups and individuals in fire prevention, suppression, and training in fuel reduction and vegetation management.

Provide information to the public and promote goals and objectives related to wild land fire prevention.

Plan and implement public education programs designed for groups such as neighborhoods, schools, churches, and homeowner associations.

Plan, develop, and coordinate a vegetation recycling program to assist homeowners in reducing the fuel load on their property, including curbside chipping and fuel reduction.

Assist in the development of the division budget; make recommendations that affect allocation of resources; make expenditures decisions once the budget has been approved; monitor and track the budget; data collection and organization of budget material.

Provide data regarding fire inspection or prevention activities; assist in preparing a variety of reports regarding fire inspection and prevention.

Assist in the development of fire prevention policies, procedures, and codes.

Assign, review, participate in, and coordinate the work of subordinate staff; supervise and train subordinate staff; conduct performance evaluations and carry out disciplinary action as necessary; participate in the selection of new employees.

Investigate citizen complaints as they relate to division personnel and code enforcement activities.

Respond to major emergency events performing in an overhead capacity.

Operate a vehicle in the performance of assigned duties.

KNOWLEDGE AND ABILITIES

Knowledge of:

- Principles, practices, and techniques of public administration, organization, operations, and fiscal management.
- Laws, ordinances, and regulations relating to the management of service delivery and support programs.

- Administrative principles and methods, including goal setting, program development, and implementation.
- Principles and practices of budget development and administration.
- Contract negotiation and administration.
- Federal, state and local funding sources and grant application procedures.
- Principles, practices, and techniques of human resource management including supervision and personnel development.
- Principles, practices, and techniques of fire prevention and suppression, vegetation management, code enforcement, commercial and residential inspection, hazardous materials use, handling, storage, and disposal.
- Principles and techniques of promotion, marketing, customer service, education, and public relations.
- Computer systems, applications, mobile devices, and emergency communications
- Safety procedures and techniques.

Ability to:

- Implement and apply goals, objectives, policies, procedures, complex rules, regulations, laws, and ordinances.
- Enforce the Uniform Fire Code and Building Code.
- Utilize instruction manuals and maps.
- Read and interpret building plans.
- Accurately and effectively enforce laws, ordinances, and regulations relating to arson and hazardous materials incidents.
- Evaluate programmatic, administrative, and operational systems.
- Prepare and analyze complex reports, correspondence and other written materials.
- Use computer applications, software programs and other electronic devices.
- Analyze complex situations, problems, and data and use sound judgment in drawing conclusions and making decisions.
- Safely operate automotive vehicles in the performance of the assigned duties.
- Supervise and direct subordinate professional and support staff.
- Interpret and enforce administrative/operational policies, practices, and procedures.
- Maintain departmental standards and procedures.
- Work an irregular schedule including early mornings, evenings, and weekends.
- Oversee teams and manage multiple projects.
- Establish effective working relationships with individuals, organizations, City Council, Mayor, City Administrator, boards and commissions, staff, city agencies, departments and offices.
- Communicate effectively and persuasively in both oral and in written forms.
- Prepare complex reports, correspondence, and other written materials, including official reports.
- Conduct training sessions and make verbal presentations to small groups.
- Determine and establish priorities, set standards, and provide guidelines.
- Provide strong leadership, initiative, and drive and creative and flexible problem-solving skills.
- Negotiate and administer a variety of contracts.
- Work effectively with ethnically diverse constituencies; be sensitive to political and

cultural issues and concerns.

- Provide staff training and conduct performance appraisals.
- Correctly apply technology as required on the job.

MINIMUM QUALIFICATIONS

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

Education:

An Associate’s degree in fire science, public or business administration or closely related field. Successful completion of California State Fire Training (SFT) Fire Prevention Officer 1A, 1B, and 1C courses (by December 31, 2014) or Fire Inspector 1A, 1B, 1C, and 1D courses (effective August 1, 2013) is required.

Experience:

~~Three-Four (4) years of professional-sworn fire service~~ experience in fire protection, suppression, prevention, inspection, code enforcement, investigation, personnel, and fire education or training. ~~T.—two (2) years of Lead or supervisory experience~~ is highly desirable.

LICENSE AND CERTIFICATE

Possession of a valid California Class “C” or higher driver's license issued by the Department of Motor Vehicle (DMV). Individuals who are appointed to this position will be required to maintain a valid California Driver’s License throughout the tenure of employment.

Must possess a valid Fire Inspector I certification through one of the following prior to completion of probation, and maintain possession by renewing the certification on or before the expiration date:

California International Code Council (ICC)

OR

California Office of the State Fire Marshal (OSFM)

OR

National Fire Protection Association (NFPA)

OR

or equivalent as defined by the California Office of the State Fire Marshal

~~Must be able to obtain a valid Certification by the completion of probation and maintain possession by renewing the certification on or before the expiration date.~~

~~Fire Prevention Officer I, II, III California State Fire Training Fire Inspector 2A, Fire Inspector 2B, Fire Inspector 2C, and Fire Inspector 2D course completion is desirable~~
~~Certifications are desirable.~~

OTHER REQUIREMENTS

Must be eighteen (18) years of age or older by the application closing date.

Must pass a thorough background investigation that complies with the background clearance of California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI).

May be required to pass an employment physical examination.

Must be a U.S. citizen or legally authorized to work in the United States.

Must have an acceptable driving record.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY			
Established	03/20/2014	CSB Resolution #:	44709 Salary Ordinance #:
:			
Exempted:	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>	Exemption Resolution #:	
Revision Date:	08/17/2017	CSB Resolution #:	4486
			3
Re-titled Date:	/ /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s):			



MEMORANDUM

DATE: November 15, 2018

TO: The Honorable Civil Service Board

FROM: Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Greg Preece, Human Resources Manager, Recruitment & Classification

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specification for Real Estate Agent

Based upon a classification review at the request of the Economic and Workforce Development Department, staff has proposed revisions to the **Real Estate Agent** classification specification. The classification specification was last revised in December 2014.

The following modifications to the classification specification were proposed:

1. Replace all references to “disposal” with the term “disposition” since it is more accurate.
2. Amend the Distinguishing Characteristics section to include references to the Supervising Real Estate Agent classification.
3. Make minor revisions to one task statement in the Examples of Duties section.
4. Revise the Education requirement to omit the language “with major coursework” and change completion of the recognized real estate appraisal course from required to desirable.
5. Add possession of a Real Estate agent license as desirable under the License or Certificate section.

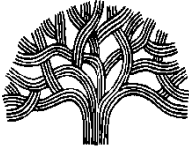
There is one vacancy. The revised specification will be used to initiate a recruitment and selection process in the near future.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City staff and union representatives met on September 20, 2018 and October 18, 2018 regarding the changes. In an email dated October 25, 2018, the union confirmed that they have no objections to the proposed revisions.

Additionally, no determination has been rendered regarding the “common class” status of this classification. The "Common Class" Project is currently underway, and more information will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed revisions to the **Real Estate Agent** classification specification.

Attachments: Revised draft Real Estate Agent classification specification.



REAL ESTATE AGENT

CITY OF OAKLAND

Class Code: AP308

Civil Service Classified

DEFINITION

Under general supervision in the Economic & Workforce Development Department, uses a full range of professional skills to perform work related to the appraisal, acquisition, transfer, leasing, property management, sale, and dispositional of real property and interests there-in for the City of Oakland and the Oakland Redevelopment Successor Agency (ORSA); and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This is a journey level classification whose incumbents perform a broad range of duties which require independent judgment involving appraisal, acquisitions, transfer, leasing, property management, and sale of improved and unimproved commercial, industrial and residential properties and interests therein. This classification is distinguished from the higher level Manager, Real Estate Services in that incumbent of the latter classification has responsibility for the overall administration of real estate services for the City of Oakland and ORSA, and It is further distinguished from the Supervising Real Estate Agent, which is responsible for oversight of daily operations including supervises Real Estate Agents and other technical and clerical staff.

Incumbents rReceives general supervision from the Manager, Real Estate Services or Supervising Real Estate Agent and m—May provide project direction to assigned technical and clerical staff and contractors.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to, the following:*

Respond to real estate and property management service requests or referrals from the public, governmental agencies or City departments; provide customer service in response to questions and complaints; conduct research and recommend timely appropriate action.

Appraise residential, commercial and industrial property or interests therein for the City of Oakland and ORSA; estimate the value of land and improvements; review appraisals; perform appraisal contract administration.

Acquire real property and interest therein for the City and the ORSA; negotiate with property owners, attorneys and lessees and other parties-in-interest agreements and settlements, and make recommendations eminent domain when as necessary.

Coordinate and oversee the operation of City and ORSA properties; review and approve consultant work such as professional service contracts; prepare and evaluate feasibility studies and financial analyses; maintain property inventory records; write specifications for the sale of surplus real property; arrange sale or auction of surplus real estate; perform property management functions.

Prepare deeds, easements, leases, licenses and other contractual documents necessary for appraisal, acquisition, leasing, property management and dispositional of real property; negotiate contracts, leases, property and right-of-way acquisitions, and other issues with property owners, attorneys, lessees and other parties in interest; negotiate licenses and permits.

Analyze legislation, legal documents and regulations that affect ownership, special assessment districts, zoning and asset management activities; prepare legislation, written and oral reports for approval by City Council, various boards, commissions and other public entities.

May serve as project leader or team member in complex acquisition, appraisal, property management or dispositional assignments; coordinate, review and approve consultant work such as property management contracts; perform on the job training for assigned staff.

Provide site and market analyses and recommendations for redevelopment projects; analyze title and property records, ownership restrictions and information; review environmental site assessment information; interpret property sale and lease listings.

Operate an automotive vehicle to perform field visits in conjunction with work assignments.

KNOWLEDGE AND ABILITIES:

Knowledge of:

- Real estate principles and practices in both public and private sector.
- Real estate appraisal and review procedures, public real estate management and acquisitions of right-of-way.
- Federal, state and local laws pertaining to funding, acquisitions, appraisal, management, leasing and dispositional of real property.
- Market analysis techniques and economic factors affecting property values and improvements.
- Negotiation techniques and strategies.
- Records management, time management and operation of personal computer and software applications.
- Relocation assistance eligibility and entitlements.
- Asset Management and Lease administration principles and practices including Office, Retail, Telecommunications and Billboards.

Ability to:

- Prepare Real Estate agreements, contracts and other real property related documents.
- Prepare and review legal descriptions.
- Perform financial analysis; investigate deeds and appraisal comparable data.
- Negotiate leases and real property acquisitions/dispositional.
- Read and interpret maps and engineering plans.
- Research, analyze and prepare written reports, contracts and other documents as needed.
- Work on multiple projects simultaneously using good time management techniques.
- Make sound, independent judgments within established guidelines and time frames.
- Operate automated office equipment; maintain organized and accurate records; track

suspense dates and work assignments.

- Speak and write clearly and concisely; give oral presentations.
- Establish and maintain effective work relationships with those contacted in the performance of required duties.

MINIMUM QUALIFICATIONS

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

Education:

A Bachelor's degree from an accredited college or university ~~with major coursework~~ in real estate, economics, finance, business, or public administration, or a closely related field.

Completion of a recognized real estate appraisal course ~~required~~ is desirable.

Experience:

Three (3) years of experience involving real property appraisal, acquisition, including right-of-way negotiations, lease negotiations, property management and ~~dispositions~~ at.

Public agency ~~r~~Real ~~e~~Estate experience is preferred.

LICENSE OR CERTIFICATE

Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment.

Real Estate broker or agent license desirable.

State of California General or Residential Appraisal certification desirable.

International Right of Way Assn. Senior designation (SR/WA) desirable.

Certified Property Manager (CPM) designation desirable.

Certified Commercial Investment Member (CCIM) designation desirable.

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY				
Established:	07/23/1998	CSB Resolution #:	44380	Salary Ordinance #:
Exempted:	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>	Exemption Resolution #:		
Revision Date:	12/18/2014	CSB Resolution #:	44750	
Re-titled Date:	/ /	CSB Resolution #:		Salary Ordinance #:
(Previous title(s):				



CIVIL SERVICE BOARD MEETING MINUTES - DRAFT

Date: October 18, 2018

OPEN SESSION 5:30 p.m.

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS: Chair, Andrea Gourdine; Vice Chair, David Jones (Absent); Lauren Baranco (Absent); Yvonne Hudson-Harmon; Christopher Johnson; Carmen Martinez; Beverly A. Williams

STAFF TO THE BOARD: Ian Appleyard, HRM Director/Secretary to the Board
Greg Preece, HRM Manager/Staff to the Board
Tabitha Pulliam, HRM Technician/Staff to the Board
Michelle Meyers, Senior Deputy City Attorney

OPEN SESSION AGENDA

ROLL CALL

1) OPEN FORUM:

No speakers

1a) Updates: Secretary to the Board – General Recruitment Updates

2) CONSENT CALENDAR:

- a) Ratification of Provisional Appointment
 - Housing Development Coordinator IV
- b) Approval of Employee Requests for Leave of Absence
 - Library
 - Oakland Police Department
 - Public Works Department
- c) Approval of Revised Classification Specifications
 - Animal Control Supervisor
 - Gardener II
 - Gardener Crew Leader
 - Park Equipment Operator

44908 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Johnson to approve the Ratification of Provisional Appointment, the Requests for Leave of Absence and the Revised Classification Specifications. The motion passed unanimously.

Votes: Board Member Ayes: 5 – Gourdine, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Jones

3) OLD BUSINESS:

a) Approval of September 20, 2018 Civil Service Board Meeting Minutes

44909 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Williams to approve the September 20, 2018 Civil Service Board Meeting Minutes. The motion passed.

Votes: Board Member Ayes: 5 – Gourdine, Hudson-Harmon, Martinez, Williams

Board Member Noes: None

Board Member Abstentions: Johnson

Board Members Absent: Baranco, Jones

b) Approval of the August 16, 2018 Civil Service Board Meeting Minutes

44910 A motion was made by Board Member Johnson and seconded by Board Member Hudson-Harmon to approve the August 16, 2018 Civil Service Board Meeting Minutes. The motion passed.

Votes: Board Member Ayes: 4 – Gourdine, Hudson-Harmon, Johnson, Williams

Board Member Noes: None

Board Member Abstentions: Martinez

Board Members Absent: Baranco, Jones

c) Determination of Schedule of Outstanding Board Items

Report received and filed

d) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

Report received and filed

- e) Common Classification Study Updates

Report received and filed

4) NEW BUSINESS:

- a) Approval of New Classification Specification for Transportation Planner I, Transportation Planner II and Transportation Planner III.

44911 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Martinez to approve the New Classification specifications for Transportation Planner I, Transportation Planner II and Transportation Planner III. The motion passed unanimously.

Votes: Board Member Ayes: 5 – Gourdine, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Jones

- b) Quarterly Report per Section 3.04(f) of the Personnel Manual of the Civil Service Board (“Civil Service Rules”) Providing Status of All Classification Specifications Revisions Currently Under Review

44912 A motion was made by Board Member Johnson and seconded by Board Member Williams to approve the Quarterly Report. The motion passed unanimously.

Votes: Board Member Ayes: 5 – Gourdine, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Jones

- c) Informational Report regarding Provisional Appointments

Report received and filed

- d) 6.05 – Appeal of Removal or Demotion of Employee During the Probationary Period PORT-2018-AP01 (R. Arguello).

44913 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Johnson to Sustain the Actions of the Appointing Authority, the Port of Oakland, in the appeal submitted by R. Arguello - Appeal of Removal or Demotion of Employee During the Probationary Period (Port-2018-AP01)

Votes: Board Member Ayes: 5 – Gourdine, Hudson-Harmon, Johnson, Martinez, Williams

Board Member Noes: None
Board Member Abstentions: None
Board Members Absent: Baranco, Jones

5) ADJOURNMENT

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, November 15, 2018. All materials related to agenda items must be submitted by Thursday, November 1, 2018. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandca.gov



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email civilservice@oaklandca.gov or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico civilservice@oaklandca.gov o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 civilservice@oaklandca.gov 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



**CIVIL SERVICE BOARD
 APPEALS & HEARINGS CALENDAR
PENDING LIST – November 15, 2018**

1. OPEN

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps

2. OTHER PENDING ITEMS

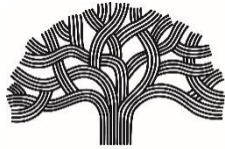
Date Requested	Subject	Report From	Date Due

3. CLOSED

Case Number	Classification	Dept.	Action Pending	Date Received	Notes

4. UNDER REVIEW

Case Number	Classification	Dept.	Action Pending	Action Date	Notes



CITY OF OAKLAND

STAFF REPORT

DATE: November 15, 2018

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Greg Preece, HR Manager, Staff to the Board

THROUGH: Ian Appleyard, HR Director, Secretary to the Board

SUBJECT: TEMPORARY EMPLOYEES – Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of All ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

SUMMARY

Staff has prepared this report to provide the Civil Service Board with an update on compliance with the Civil Service Rules related to temporary employees since the last report at the October 18, 2018 meeting that referenced data as of September 21, 2018. This report focuses on temporary employees in the categories of Exempt Limited Duration Employees (ELDEs) and Temporary Contract Service Employees (TCSEs), who are currently employed in the City of Oakland.

As of October 19, 2018, there are a total of sixty-three (63) employees in the TCSE (18), TCSE/Annuitant (33), and ELDE (12) categories. Four (4) assignments were closed, and seven (7) new assignments were added. Of the total, there are zero (0) assignments reported as non-compliant with Rule 5.06.

Reports showing all the temporary assignments discussed in this report are included in a list (*Attachment A*) and a chart of trends (*Attachment B*) attached to this narrative report to provide a snapshot of the overall changes month to month.

BACKGROUND

The use of temporary employees is allowed under Civil Service Rule 5 (Certification and Appointment) in recognition that standard Civil Service employment practices can be cumbersome when a time-sensitive assignment arises or existing resources do not fit a specific need. Pursuant to the Civil Service Rules, Section 5.06 governing temporary assignments, ELDE assignments may not exceed one year and TCSE assignments may not be “ongoing or repetitive.”

STATUS OF NONCOMPLIANT ASSIGNMENTS

Of the total sixty-three (63) temporary assignments, we are reporting zero (0) in this period as out of compliance with Rule 5.06.

RECOMMENDATION

Staff recommends that the Civil Service Board accept the monthly report on temporary assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs).

For questions regarding this report, please contact Greg Preece, Recruitment & Classification at (510) 238-7334.

Attachments:

- A. TCSE/ELDE Report: For Payroll Reporting October 19, 2018.
- B. TCSE/ELDE Compliance Trend Chart: As of October 19, 2018.

**CIVIL SERVICE BOARD
NOVEMBER 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

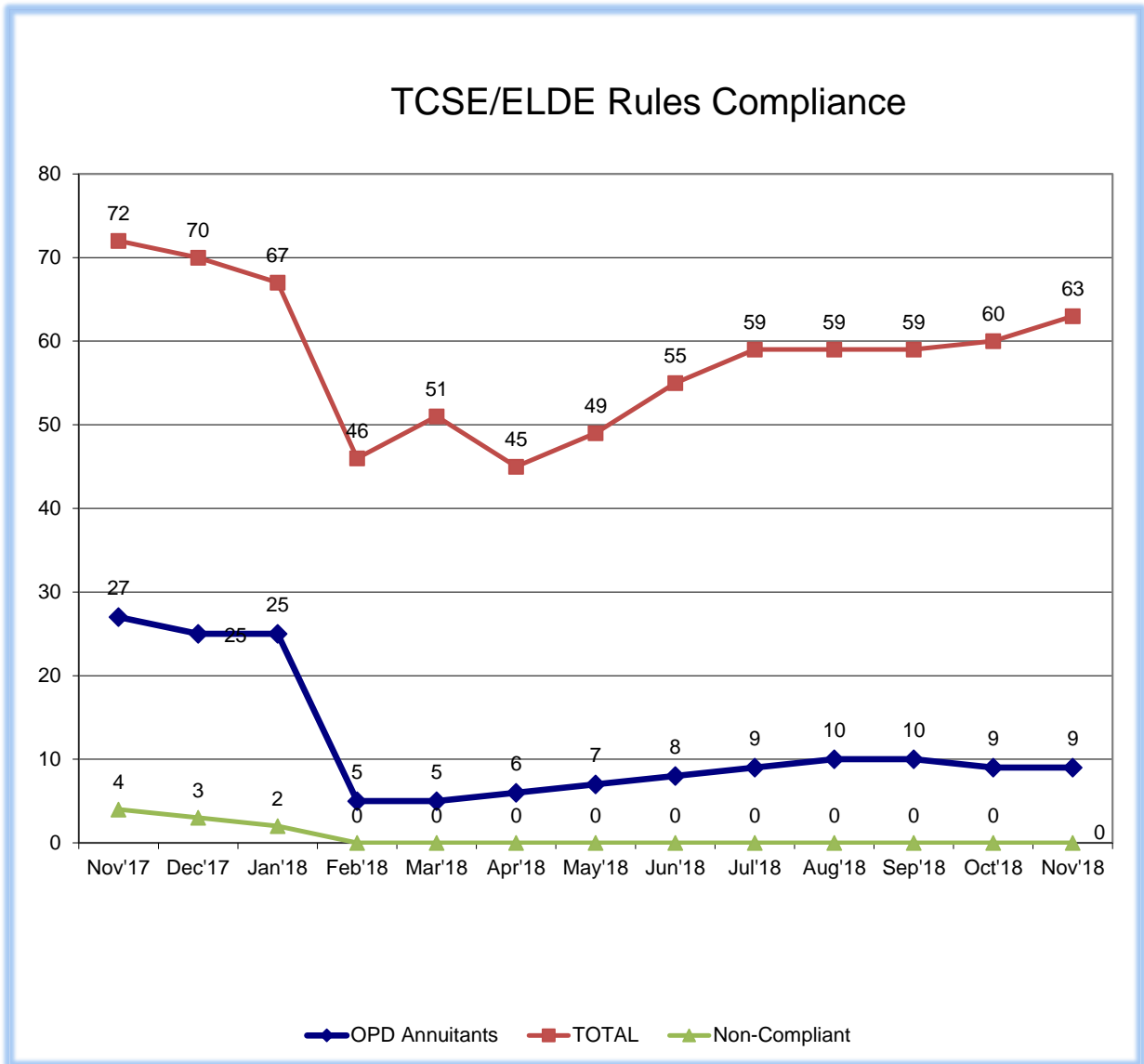
DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
CLOSED THIS PERIOD (4)								
CITY ADMINISTRATOR	Dyckoff	Howard	02111 - Administration Unit	9/27/2017	TCSE	0	Temporary project: Oakland Design League - to build the City's new website.	SEPARATED
CITY ADMINISTRATOR	Martinson	Leif	02111 - Administration Unit	9/27/2017	TCSE	0	Temporary project: Oakland Design League - to build the City's new website.	SEPARATED
CITY ATTORNEY	Moore	Cheryl	04111 - City Attorney Administration Unit	4/25/2018	TCSE/ Annuitant	507	Temporary assistance in eliminating file backlog and special project for file inventory.	SEPARATED
HOUSING & COMMUNITY DEV.	Cleveland	Everett	89929 - Housing Development	5/7/2018	TCSE	373	Temporary project performing significant administrative duties	SEPARATED
NEW THIS PERIOD (7)								
HUMAN RESOURCES	Look	Daryl	05211 - Human Resources Management	9/24/2018	TCSE/ Annuitant	60	Temporary staffing to support classification and recruitment needs for city operations	COMPLIANT
HUMAN SERVICES	Dennis	Lisa	78231 - HS Classroom & Seasonal	8/13/2018	ELDE		Temporary, emergency staffing to prepare for upcoming review/inspections.	COMPLIANT
HUMAN SERVICES	Lemos	Jesus	78231 - HS Classroom & Seasonal	10/1/2018	TCSE	73	Temporary, emergency staffing to prepare for upcoming inspections	COMPLIANT
INFORMATION TECHNOLOGY	Harrison	Kevin	46111 - Administrative Services	10/1/2018	TCSE	110	Temporary project to provide expert guidance in maintaining the integrity and security of network operations, back-ups and disaster recovery.	COMPLIANT
INFORMATION TECHNOLOGY	Ibrahim	Mamadou	46531 - Technology Department	9/22/2018	ELDE		Temporary project to help develop and implement the new PRIME System for OPD.	COMPLIANT
PLANNING & BUILDING	Alvin	Corey	84211 - Planning	9/8/2018	ELDE		Temporary project to coordinate the implementation of the environmental protection measures for the Oakland Army Base Redevelopment project.	COMPLIANT
POLICE	Smith	Angela	108150 - District 5 Area	10/20/2018	TCSE	0	Temporary staffing to support critical need in the administration of the OPD towing services contract	COMPLIANT
COMPLIANT (56)								
CITY ADMINISTRATOR	Dalmasso	Jennifer	02491 - Oakland Animal Services	5/19/2018	TCSE/ Annuitant	0	Temporary on-call Veterinarian until premise license and DEA permit for shelter are transitioned	COMPLIANT
CITY ADMINISTRATOR	Griffin	Bendu	02621 - Employment Services	4/21/2018	ELDE		Temporary support to assist department with project close out phase	COMPLIANT
CITY ADMINISTRATOR	Hollenback	Joy	02491 - Oakland Animal Services	4/24/2018	TCSE/ Annuitant	595	Temporary on-call Veterinarian due to resignation of former incumbent	COMPLIANT
CITY ADMINISTRATOR	Kennedy	Christopher	02112 - Communications & Media	7/23/2018	TCSE	533	Temporary project: Oakland Design League - Front end/full stack developer	COMPLIANT
CITY ADMINISTRATOR	Kwan	Jennifer	02491 - Oakland Animal Services	5/12/2018	TCSE	101	Temporary part time Veterinarian to supplement and add capacity to service delivery	COMPLIANT
CITY ADMINISTRATOR	Mason	Vanessa	02111 - Administration Unit	9/27/2017	TCSE	429	Temporary project: Oakland Design League - to build the City's new website.	COMPLIANT
CITY ADMINISTRATOR	Mufarreh	Chris	02491 - Oakland Animal Services	4/23/2018	TCSE/ Annuitant	182	Temporary on-call Manager	COMPLIANT
CITY ADMINISTRATOR	Swanson	Luke	02111 - Communications Unit	11/20/2017	TCSE	494	Temporary project: Oakland Design League - to build the City's new website	COMPLIANT
CITY CLERK	Abney	Michelle	03121 - Office of the Clerk	5/30/2018	TCSE/ Annuitant	407	Temporary support of the Hotel Labor and Youth Services measures.	COMPLIANT
CITY COUNCIL	Lopes	Joyce	00011 - Council Administration Unit	10/4/2016	TCSE/ Annuitant	0	Filing in for Council staff out on leave	COMPLIANT
CONTROLLER - FINANCE	Bhatnager	Amit	08211 - Accounting Administration Unit	1/8/2018	TCSE	342	Temporary project to develop Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Applications.	COMPLIANT

**CIVIL SERVICE BOARD
NOVEMBER 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
DEPT. OF TRANSPORTATION	Brown	Brytane	35214 - Complete Streets Planning & Project	1/13/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Grant	Surlene	35111 - Director's Office	1/29/2018	TCSE	235	Temporary project to develop & implement a Public Outreach Strategy for the Capital Improvement Program (CIP).	COMPLIANT
DEPT. OF TRANSPORTATION	Neary	Michael	35211 - Department of Transportation	5/21/2018	TCSE/ Annuitant	156	Temporary assistance to develop, manage and implement the GoPort Program (transportation improvement)	COMPLIANT
DEPT. OF TRANSPORTATION	Ortiz	Julieth	35211 - Great Streets Delivery Administration	8/11/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Phan	Hank	35245 - Bicycle & Pedestrian Program	4/7/2018	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
ECON & WORKFORCE	Kidder	Sarah	85511 - Cultural Arts & Marketing	6/17/2017	TCSE	23	Temporary project support in the Film Office.	COMPLIANT
ECON & WORKFORCE	Shahzada	Irfan	85111 - Admin: Economic & Workforce Development	5/5/2018	ELDE		Spec under revision for Accountant II; duties not yet fully defined.	COMPLIANT
FINANCE	Macias	Dalia	08211 - Accounting Administration Unit	7/11/2018	ELDE		Temporary project to assist with clean-up of Capital Projects and vendor data.	COMPLIANT
FINANCE	Misgun	Lula	08111 - Finance/Admin Unit	6/18/2018	TCSE/ Annuitant	577	Temporary support for Executive Assistant out on leave.	COMPLIANT
FINANCE	Treglown	Donna	08111 - Finance/Controller	6/18/2018	TCSE/ Annuitant	488	Temporary assistance to complete Capital projects and end of year fiscal reconciliations.	COMPLIANT
FINANCE/TREASURY	Poon	Natalie	08741 - Treasury Payroll	4/9/2018	TCSE	532	Temporary support for Human Resources Operations Tech out on leave.	COMPLIANT
FIRE DEPARTMENT	Domingo	Renee	20711 - Emergency Services Program	7/16/2018	TCSE/ Annuitant	104	Temporary assignment to train new Emergency Services Manager	COMPLIANT
FIRE DEPARTMENT	Fairley Summers	Helen Marie	20241 - Fire Communications Unit	8/11/2018	TCSE/ Annuitant	212	Temporary assistance to train new Fire Communication Dispatchers and special project related to on-boarding and training	COMPLIANT
FIRE DEPARTMENT	Kozak	Rebecca	20110 - Fire Chief Unit	5/21/2018	TCSE/ Annuitant	339	Temporary assistance developing staff and functions of the Office of the Chief of Fire manual and train Executive Assistant	COMPLIANT
FIRE DEPARTMENT	Weisgerber	William	20311 - Fire Marshal's Office Unit	5/7/2018	TCSE/ Annuitant	539	Temporary assistance until Fire Marshal is appointed	COMPLIANT
HOUSING & COMMUNITY DEV.	Henderson	Troy	89939 - Minicipal Lending	8/11/2018	TCSE	360	Temporary assignment to cover the duties of employee out on leave	COMPLIANT
HUMAN SERVICES	Breedlove	Jaqueline	75231 - Multipurpose Senior Service Program	2/24/2018	TCSE/ Annuitant	465	Provide training to new Case managers and complete procedural manual for future reference per funder's mandate.	COMPLIANT
HUMAN SERVICES	Decuir	Roslynn	78241 - Year Round Lunch Program Unit	5/23/2016	TCSE	187	PT Food Program Coordinator; intermittent, pending creation of PT class; HRM staff preparing salary ordinance amendment to add part time equivalent in Feb/Mar 2018	COMPLIANT
HUMAN SERVICES	Hicks	Kathleen	78111 - DHS Administration Unit	3/1/2018	TCSE	516	Filing in for Executive Assistant staff out on leave.	COMPLIANT
HUMAN SERVICES	Ho	Kathy	78231 -HS Classroom & Seasonal	1/29/2018	TCSE/ Annuitant	150	Temp staffing to help with Instructor Staffing Crises and to meet Federal and State regulations of the Head Start Program.	COMPLIANT
HUMAN SERVICES	Martin-Bobo	Pamela	75231 - Senior Services Program	1/3/2018	ELDE		Temporary appointment while FEHA hold is in place.	COMPLIANT
HUMAN SERVICES	Shelton	Susan	78411 - Community Housing Services	9/11/2017	TCSE/ Annuitant	97	Temporary project: plan, facilitate and update Oakland Homeless Strategy	COMPLIANT
PLANNING & BUILDING	Borjon	Agustin	84229 - Zoning	2/27/2017	TCSE/ Annuitant	256	Time-limited project; temp assistance with backlog of permits	COMPLIANT
PLANNING & BUILDING	Dignan	Katie	84111 - Administration Unit	6/30/2018	ELDE		Temporary assistance to oversee the Building and Planning Bureaus.	COMPLIANT
PLANNING & BUILDING	Gunari	Seth	84111 - Admin: Planning, Building & Neighborhood Services	3/12/2018	ELDE		Temporary assignment to support Specialty Combination Inspectors	COMPLIANT
POLICE	Covington	Donald	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	155	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT

**CIVIL SERVICE BOARD
NOVEMBER 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
POLICE	Gray	Steve	106610 - Background & Recruiting	7/17/2017	TCSE/ Annuitant	95	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Hicks	Mark	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	207	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Johnson	Carmen	106610 - Background & Recruiting	1/18/2014	TCSE/ Annuitant	284	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Lighten	Ronald	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	8	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Mestas	Alfred	100610 - Background & Recruiting	1/27/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Pressnell	Edward	100610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	16	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Quintero	Joseph	106610 - Background & Recruiting	10/12/2013	TCSE/ Annuitant	27	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Williams	Pamela	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	20	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
PUBLIC WORKS	Chavez	Humberto	30541 - Equipment Services Division	12/18/2017	TCSE	256	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Combs	Jocelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	154	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
PUBLIC WORKS	Ferguson	David	30611 - Bureau Facilities & Environment	1/13/2018	TCSE/ Annuitant	499	Assistant Director - Short term management of the Bureau of Facilities and Environment.	COMPLIANT
PUBLIC WORKS	Hernandez	Raul	30244 - Sanitary Sewer Design	8/11/2018	TCSE	383	Temporary assignment to assist with the City's Private Sewer Lateral (PSL) program.	COMPLIANT
PUBLIC WORKS	Kuvetakis	Joseph	30541 - Equipment Services Division	12/18/2017	TCSE/ Annuitant	0	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Ogbamichael	Lettebrhan	30121 - PWA Admin/Fiscal Services	8/11/2018	TCSE/ Annuitant	256	Temporary assignment to cover the duties of employees out on leave	COMPLIANT
PUBLIC WORKS	Perez - Perez	A. Nichole	30112 - Human Resources	3/24/2018	TCSE	396	Temporary support for Payroll staff out on leave	COMPLIANT
PUBLIC WORKS	Pham	Tan	30541 - Equipment Services Division	12/18/2017	TCSE/ Annuitant	180	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Tsang	Diana	30121 - PWA Admin/Fiscal Services	9/8/2018	TCSE	216	Temporary assignment to cover the duties of employees out on leave	COMPLIANT
PUBLIC WORKS	Vargas	Abel	30541 - Equipment Services Administration	9/10/2018	TCSE/ Annuitant	232	Temporary assistance to ensure critical City services, including public safety.	COMPLIANT
PUBLIC WORKS	Weed	Jonelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	180	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
Non-Compliant (0)								





City of Oakland/Port of Oakland Common Classification Equivalency Study

November 15, 2018 Meeting

Agenda

- Project Status Update
- Comparability Scoring
 - Criteria and Parameters
- Report of Findings
 - HR and Accounting Occupational Groupings
- Next Steps
 - K&A
 - Port and City

Approaches/Metrics

Non-Quantitative/Broad Based

Analyze top 10 tasks to determine degree of comparability

Quantitative/Factor Based

Federal Factor Evaluation System (FES) – analyze 5 factors to determine point values for each class

Approaches/Metrics – FES Factors

- Factor 1 – Knowledge required for the position
- Factor 2 – Supervisory controls (received by employees)
- Factor 3 – Guidelines: work guidelines/judgment to interpret and apply them
- Factor 4 – Complexity: work diversity/difficulty
- Factor 5 – Scope and Effect: relationship between nature of work and effect on services or products

Project Status Update – K&A

- Analysis and findings complete for the following occupational groupings:
 - Human Resources Management
 - Accounting & Budget

Comparability Scoring

- Classifications scored
- Pairing differentials calculated
 - 10% or smaller differential considered sufficiently similar for identification as common classes

Human Resources Management Occupational Grouping

- Nine class pairings scored using factor system
- Seven class pairings with 10% or smaller differential
- Two class pairings with differential greater than 10%

Human Resources Management Occupational Grouping

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Human Resource Analyst, Assistant	3050	Port Assistant Human Resource Analyst	3050	0	0%
Human Resource Analyst	3575	Port Human Resource Analyst	3575	0	0%
Human Resource Analyst, Senior	4100	Port Senior Human Resource Analyst	4025	75	1.9%
Human Resource Analyst, Principal	4375	Human Resource Supervisor	3850	525	13.6%
Human Resource Clerk	1200	Port Human Resource Clerk	1100	100	9%
Human Resource Clerk	1200	Port Human Resources Assistant	1200	0	0%
Human Resource Technician	2000	Port Human Resource Technician	2000	0	0%
Human Resource Technician, Senior	825	Port Human Resource Technician	750	75	10%
Training Coordinator	2725	Training/Development Specialist	2400	325	13.5%

Human Resources Management Occupational Grouping

- Overlap in pairings for two classifications
 - City Human Resource Clerk
 - Port Human Resource Technician

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Human Resource Clerk	1200	Port Human Resource Clerk	1100	100	9%
Human Resource Clerk	1200	Port Human Resources Assistant	1200	0	0%
Human Resource Technician	2000	Port Human Resource Technician	2000	0	0%
Human Resource Technician, Senior	825	Port Human Resource Technician	750	75	10%

Human Resources Management Occupational Grouping

- Common Classifications Identified

City Classification	Port Classification
Human Resource Analyst, Assistant	Port Assistant Human Resource Analyst
Human Resource Analyst	Port Human Resource Analyst
Human Resource Analyst, Senior	Port Senior Human Resource Analyst
Human Resource Clerk	Port Human Resources Assistant
Human Resource Technician	Port Human Resource Technician

Human Resources Management Occupational Grouping

- Further analysis needed
 - Supervisory control inconsistent with the body of work
 - Differential between classes is due solely to the supervisory control scores

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Training Coordinator	2725	Training/Development Specialist	2400	325	13.5%

Accounting and Budget Occupational Grouping

- Seven classification pairings sufficiently similar
- Two classification pairings require further analysis

Accounting and Budget Occupational Grouping

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Account Clerk II	950	Account Clerk	950	0	0%
Account Clerk III	1775	Senior Account Clerk	1775	0	0%
Accountant I	1875	Port Staff Accountant I	2175	300	16%
Accountant II	2975	Port Staff Accountant II	2975	0	0%
Accountant III	2875	Port Senior Accountant	2625	250	9.5%
Accounting Supervisor	3275	Port Accounting Supervisor	3275	0	0%
Budget and Operations Analyst III	3475	Port Budget Coordinator	3475	0	0%
Financial Analyst	3575	Port Financial Analyst	2550	1025	40%
Financial Analyst	4075	Port Senior Financial Analyst	3775	300	8%
Performance Auditor, Senior	2650	Port Associate Auditor	2150	500	23%



Accounting and Budget Occupational Grouping

- Further analysis needed
 - Supervisory controls are inconsistent with bodies of work
 - Differentials for each would be within 10%

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Accountant I	1875	Port Staff Accountant I	2175	300	16%
Performance Auditor, Senior	2650	Port Associate Auditor	2150	500	23%

Next Steps – K&A

- Awaiting direction from City, Port, and/or Civil Service Board regarding further analysis
- Work remaining for project includes:
 - Prioritize remaining occupational groupings with Port and City
 - Prepare findings and conclusions for each remaining occupational grouping

Next Steps – K&A

- Prepare and submit reports for each occupational grouping with observations of common classes
- Develop a master list identifying common classes from all groupings once all analyses are complete

Next Steps – Port and City

- Identify and provide guidance to K&A on
 - Reporting protocols
 - Who receives reports and when
 - Review process
 - Who reviews reports and when
 - Final report distribution

City of Oakland/Port of Oakland Comparability of Duties and Responsibilities

Based Upon Broad Comparability First Ten Duty Statements in Class Specification

Level	Measure	Points	Comments
Comp-1	Two (2) of ten statements are sufficiently similar as to be comparable	50	Same points as Level 1 of Knowledge Matrix
Comp-2	Four (4) of ten statements are sufficiently similar as to be comparable	350	Same points as Level 3 of Knowledge Matrix
Comp-3	Six (6) of ten statements are sufficiently similar as to be comparable	750	Same points as Level 5 of Knowledge Matrix
Comp-4	Eight (8) of ten statements are sufficiently similar as to be comparable	1250	Same points as Level 7 of Knowledge Matrix
Comp-5	Ten (10) of ten statements are sufficiently similar as to be comparable	1850	Same points as Level 9 of Knowledge Matrix

- Sufficiently similar means that, although the duties may be written differently, a reasonable conclusion can be drawn that the statements are comparable, based upon the intent of the overall statements.
- Requires an objective interpretation, but may be perceived as subjective.

FES Factor 1 - Knowledge Required by the Position

Measures the nature and extent of information or facts that a worker must understand to do acceptable work, e.g., steps, procedures, practices, rules, policies, theories, principles and concepts, and the nature and extent of the skills needed to apply this knowledge. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

Level	Description	Points
1-1	<p>Knowledge of simple, routine or repetitive tasks or operations that typically include following step-by-step instructions and require little or no previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Skill to operate simple equipment or equipment that operates repetitively and requires little or no previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	50
1-2	<p>Knowledge of basic or commonly used rules, procedures or operations that typically require some previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Basic skill to operate equipment requiring some previous training or experience, such as keyboard equipment;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	200
1-3	<p>Knowledge of a body of standardized rules, procedures and operations that require considerable training and experience to perform the full range of standard clerical assignments and resolve recurring problems;</p> <p style="text-align: center;">OR</p> <p>Skill acquired through considerable training and experience, to operate and adjust varied equipment for purposes such as performing numerous standardized tests or operations;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	350
1-4	<p>Knowledge of an extensive body of rules, procedures or operations that require extended training and experience to perform a wide variety of interrelated or non-standard procedural assignments and resolve a wide range of problems;</p> <p style="text-align: center;">OR</p> <p>Practical knowledge of standard procedures in a technical field, requiring extended training or experience, to perform such work as adapting equipment when this requires consideration of the functioning characteristics of equipment; interpreting results of tests based on previous experience and observations (rather than directly reading instruments or other measures); or extracting information from various sources when this requires considering the applicability of the information and characteristics and quality of the sources;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	550
1-5	<p>Knowledge (such as would be acquired through pertinent education, experience, training or independent study), of basic principles, concepts, and methodology of a professional or administrative occupation, and skill in</p>	750

Level	Description	Points
	<p>applying this knowledge in carrying out elementary assignments, operations, or procedures;</p> <p style="text-align: center;">OR</p> <p>In addition to the practical knowledge of standards 1-4, practical knowledge of technical methods to perform assignments such as carrying out limited projects that involve use of specialized complicated techniques;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	
1-6	<p>Knowledge of the principles, concepts and methodology of a professional or administrative occupation as described in Level 1-5 that has either been (a) supplemented by skill gained through job experience to permit independent performance of recurring assignments, or (b) supplemented by expanded professional or administrative knowledge gained through relevant education or experience, that has provided skill in carrying out assignments, operations and procedures that are significantly more difficult and complex than those covered by level 1-5;</p> <p style="text-align: center;">OR</p> <p>Practical knowledge of a wide range of technical methods, principles and practices similar to a narrow area of a professional field; and skill in applying this knowledge to such assignments as the design and planning of difficult, but well precedented projects;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	950
1-7	<p>Knowledge of a wide range of concepts, principles and practices of a professional or administrative occupation, such as would be gained through extended study or experience, and skill in applying this knowledge to difficult and complex work assignments;</p> <p style="text-align: center;">OR</p> <p>A comprehensive, intensive, practical knowledge of a technical field, and skill in applying this knowledge to the development of new methods, approaches or procedures.</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,250
1-8	<p>Mastery of a professional or administrative field to:</p> <ul style="list-style-type: none"> • Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods; <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Make decisions or recommendations significantly changing, interpreting, or developing important public policies or programs; <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,550
1-9	<p>Mastery of a professional field to generate and develop new hypotheses and theories;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,850

FES Factor 2 - Supervisory Controls

Supervisory controls covers the nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.

Responsibility of the employee depends on the extent to which the employee is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing the priorities and defining objectives. The degree of review of completed work depends on the nature and extent of the review, e.g., close and detailed review of each phase of the assignment, detailed review of the finished assignment, spot-check of finished work for accuracy, or review for adherence to policy.

Level	Description	Points
2-1	<p>For both one-of-a-kind and repetitive tasks, the supervisor makes specific assignments that are accompanied by clear, detailed and specific instructions.</p> <p>The employee works as instructed and consults with the supervisor as needed on all matters not specifically covered in the original instructions or guidelines.</p> <p>For all positions the work is closely controlled. For some positions, the control is through the structured nature of the work itself; for others, it may be controlled by the circumstances in which it is performed. In some situations, the supervisor maintains control through review of the work. This may include checking progress or reviewing completed work for accuracy, adequacy, and adherence to instructions and established procedures.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Immediate Supervision 	25
2-2	<p>The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments, including suggested work methods of advice on source material available.</p> <p>The employee uses initiative in carrying out recurring assignments independently without specific instructions, but refers deviations, problems and unfamiliar situations not covered by instructions to the supervisor for decision or help.</p> <p>The supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increases with more difficult assignments if the employee has not previously performed similar assignments.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • General Supervision 	125

Level	Description	Points
2-3	<p>The supervisor makes assignments by defining objectives, priorities and deadlines and assists the employee with unusual situations that do not have clear precedents.</p> <p>The employee plans and carries out the successive steps and handles problems and deviations in the work assignments in accordance with instructions, policies, previous training, or accepted practices in the occupation.</p> <p>Completed work is usually evaluated for technical soundness, appropriateness, and conformity to policy and requirements. The methods used in arriving at the end results are not usually reviewed in detail.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Direction 	275
2-4	<p>The supervisor sets the overall objectives and resources available. The employee and supervisor in consultation, develop deadlines, projects and work to be done.</p> <p>The employee, having developed expertise in the line of work, is responsible for planning and carrying out the assignment, resolving most of the conflicts that arise, coordinating the work with others as necessary, and interpreting policy on own initiative in terms of established objectives. In some assignments, the employee also determines the approach to be taken and the methodology to be used. The employee keeps the supervisor informed of progress and potentially controversial matters.</p> <p>Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, or effectiveness in meeting requirements or expected results.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • General direction 	450
2-5	<p>The supervisor provides administrative direction with assignments in terms of broadly defined missions or functions.</p> <p>The employee has responsibility for independently planning, designing and carrying out programs, projects, studies, or other work.</p> <p>Results of the work are considered technically authoritative and are normally accepted without significant change. If the work should be reviewed, the review concerns such matters as fulfillment of program objectives, effect of advice and influence of the overall program, or the contribution to the advancement of technology. Recommendations for new projects and alterations of objectives usually are elevated for such considerations as availability of funds and other resources, broad program goals, or national priorities.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Administrative direction 	650

FES Factor 3 – Guidelines

This factor covers the nature of guidelines and the judgment needed to apply them. Guides used in occupations include, for example, desk manuals, established procedures and policies, traditional practices and reference materials such as dictionaries, style manuals, engineering handbooks, and pharmacopoeia.

Individual jobs in different occupations vary in the specificity, applicability and availability of guidelines for performance of assignments. Consequently, the constraints and judgmental demands placed on employees may also vary. For example, the absence of specific instructions, procedures and policies may limit the employee’s opportunity to make or recommend decisions, or actions. However, in the absence of procedures under broadly stated objectives, employees in some occupations may use considerable judgment in researching literature and developing new methods.

Guidelines should not be confused with the knowledge described under Factor 1, Knowledge Required by the Position. Guidelines either provide reference data or impose certain constraints on the use of knowledge. For example, in the field of medical technology, for a particular diagnosis, there may be three or four standardized tests set forth in the technical manual. A medical technologist is expected to know these diagnostic tests. However, in a given laboratory, the policy may be to use only one of the tests, or the policy may state specifically under what conditions one or the other of these tests may be used.

Level	Description	Points
3-1	<p>Specific detailed guidelines covering all important aspects of the assignment are provided to the employee.</p> <p>The employee works in strict adherence to guidelines; deviations must be authorized by the supervisor.</p>	25
3-2	<p>Procedures for doing the work have been established, and a number of specific guidelines are available.</p> <p>The number and similarity of guidelines and work situations require the employee to use judgment in locating and selecting the most appropriate guidelines, references and procedures for application and in making minor deviations to adapt the guidelines to specific cases. The employee may also determine which of the several established guidelines to use. Situations to which the existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor.</p>	125
3-3	<p>Guidelines are available but are not completely applicable to the work or have gaps in specificity.</p> <p>The employee uses judgment in interpreting and adapting guidelines, such as agency policies, regulations, precedents, and work directions for application to specific cases or problems. The employee analyzes results and recommends changes.</p>	275
3-4	<p>Administrative policies and precedents are applicable but are stated in general terms. Guidelines for performing the work are scarce or of limited use.</p>	450

Level	Description	Points
	The employee uses initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies.	
3-5	<p>Guidelines are broadly stated and non-specific, e.g., broad policy statements and basic legislation that require extensive interpretation.</p> <p>The employee must use judgment and ingenuity in interpreting the intent of the guides that do exist and in developing applications to specific areas of work. Frequently, the employee is recognized as a technical authority in the development and interpretation of guidelines.</p>	650

FES Factor 4 - Complexity

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level	Description	Points
4-1	<p>The work comprises of tasks that are clear cut and directly related.</p> <p>There is little or no choice to be made in deciding what needs to be done.</p> <p>Actions to be taken or responses to be made are readily discernible. The work is quickly mastered.</p>	25
4-2	<p>The work consists of duties that involve related steps, processes or methods.</p> <p>The decision regarding what needs to be done involves various choices that require the employee to recognize the existence of, and differences among, a few easily recognizable situations.</p> <p>Actions to be taken, or responses to be made, differ in such things as the source of information, the kind of transactions or entries, or other differences of a factual nature.</p>	75
4-3	<p>The work includes various duties involving different and unrelated processes and methods.</p> <p>The decision regarding what needs to be done depends upon the analysis of the subject, phase or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives.</p> <p>The work involves conditions and elements that must be identified and analyzed to discern interrelationships.</p>	150
4-4	<p>The work typically involves varied duties that require many different and unrelated processes and methods, such as those related to well-established aspects of an administrative or professional field.</p> <p>Decisions regarding what needs to be done include the assessment of unusual circumstances, variations in approach, and incomplete or conflicting data.</p> <p>The work requires making many decisions concerning such things as the interpretation of considerable data, planning of the work, or refinement of the methods and techniques to be used.</p>	225
4-5	<p>The work includes varied duties requiring many different and unrelated processes and methods that are applied to a broad range of activities or substantial depth of analysis, typically for an administrative or professional field.</p> <p>Decisions regarding what needs to be done include major areas of uncertainty in approach, methodology or interpretation and evaluation processes that result from such elements as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.</p>	325

Level	Description	Points
	The work requires originating new techniques, establishing criteria or developing new information.	
4-6	<p>The work consists of broad functions and processes of an administrative or professional field. Assignments are characterized by breadth and intensity of effort and involve several phases pursued concurrently or sequentially with the support of others within or outside the organization.</p> <p>Decisions regarding what needs to be done include largely undefined issues and elements and require extensive probing and analysis to determine the nature and scope of the problems.</p> <p>The work requires continuing efforts to establish concepts, theories, or programs, or to resolve unyielding problems.</p>	450

FES Factor 5 – Scope and Effect

Scope and Effect covers the relationship between the nature of the work, i.e., the purpose, breadth and depth of the assignment, and the effect of the work products or services both within and outside the organization.

Effect measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or impacts on the adequacy of research conclusions. The concept of effect alone does not provide sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture and allows consistent evaluations. Only the effect of properly performed work is to be considered

Level	Description	Points
5-1	<p>The work involves the performance of specific, routine, operations that include a few separate tasks or procedures.</p> <p>The work or service is required to facilitate the work of others; however, it has little impact beyond the immediate organizational unit or beyond the timely provision of limited services to others.</p>	25
5-2	<p>The work involves the execution of specific rules, regulations or procedures and typically comprises a segment of an assignment or project of broader scope.</p> <p>The work or service product affects the accuracy, reliability, or acceptability of further processes or services.</p>	75
5-3	<p>The work involves treating a variety of conventional problems, questions or situations in conformance with established criteria.</p> <p>The work product or service affects the design or operations of systems, programs or equipment; the adequacy of such activities as field investigations, testing operations, or research conclusions; or the social, physical and economic well being of people.</p>	150
5-4	<p>The work involves establishing criteria; formulating projects; assessing program effectiveness or investigating or analyzing a variety of unusual conditions, problems, or questions.</p> <p>The work product or service affects a wide range of agency activities, major activities or industrial concerns, or the operation of other agencies.</p>	225
5-5	<p>The work involves isolating and defining unknown conditions, resolving critical problems, or developing new theories.</p> <p>The work product or service affects the work of other experts, the development of major aspects of administrative or scientific programs or missions, or the well-being of substantial numbers of people.</p>	325
5-6	<p>The work involves planning, developing, and carrying out vital administrative or scientific programs.</p> <p>The programs are essential to the missions of the agency or affect a large number of people on a long term or continuing basis.</p>	450

CLASSIFICATION COMPARABILITY ANALYSIS
Human Resources Management Occupational Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
Port Assistant Human Resource Analyst	Comp-5	1850	N	N	1-5	750	2-1	25	3-2	125	4-2	150	5-2	150	3050	The classes are remarkably alike with the exception that the Port class may also include benefits-related work for which the City has a separate and distinct class series and therefore the City's HR Analyst series does not have the same level of working with benefits-related programs as the Port class would have the occasion to do. Experience and education requirements are the same.
City Human Resource Analyst, Assistant	Comp-5	1850		N	1-5	750	2-1	25	3-2	125	4-2	150	5-2	150	3050	
Port Human Resource Analyst	Comp-5	1850		N	1-6	950	2-2	125	3-3	275	4-4	225	5-3	150	3575	These classes are very similar and have many equivalent duty statements with the exception of benefits- and employee relations-related duties for the Port class that are not included in the City class since the City has classes specific to those functions. The City class also has a duty statement related to ongoing lead worker responsibilities and requires the knowledge of supervisory principles whereas the Port class indicates lead work related more specifically to examination procedures. Experience and education requirements are the same.
City Human Resource Analyst	Comp-5	1850		L	1-6	950	2-2	125	3-3	275	4-4	225	5-3	150	3575	
Port Senior Human Resource Analyst	Comp-5	1850		L	1-7	1250	2-3	275	3-3	275	4-4	225	5-3	150	4025	The overarching responsibilities of these classes are alike; however, the City's class description indicates a higher level of independence exercised and a larger scope of responsibility. The Port's class has many "assists with" and "coordinates" statements while the City's class description indicates responsibility for initiating and leading these duties. Also, the City's class indicates supervisory responsibilities of clerical and technical staff and lead work of professional staff in all areas of assignment. Also includes evaluating performance. Port's class has lead responsibilities which are more assignment-specific and not ongoing.
City Human Resource Analyst, Senior	Comp-5	1850		D	1-7	1250	2-3	275	3-3	275	4-4	225	5-4	225	4100	
Port Human Resource Supervisor	Comp-4	1250		D	1-7	1250	2-4	450	3-4	450	4-4	225	5-4	225	3850	Direction statements are conflicting with "general direction" indicated in definition and "administrative direction" indicated in distinguishing characteristics. Highly unlikely a class at this level would receive only administrative direction. Focus of this class is the supervision of assigned subordinates as well as participating in the difficult and complex aspects of the work.

Supervision Legend:
N = None
L = Lead
D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS
Human Resources Management Occupational Grouping

City Human Resource Analyst, Principal	Comp-4	1250		D	1-8	1550	2-3	275	3-5	650	4-5	325	5-5	325	4375	This class serves as a subject matter expert and consultant to HR and department management on related issues. Supervision of others is included but is more peripheral to the consultative and expert nature of the duties. The class has many overlapping areas of responsibility with the Port's Supervisor class; however, the City's class requires more depth of knowledge in areas of assignment.
Port Human Resource Clerk	Comp-3	750		N	1-2	200	2-1	25	3-1	25	4-2	75	5-1	25	1100	The City's description focuses on the clerical procedures of the position (e.g., "utilize word processors," "determine proper spelling, grammar, and paragraphing") and is likely reflective of the date created (1995) versus the Port's class description which is also clerical in nature but provides information regarding how those duties apply specifically to HR processes and also indicates that incumbents have some duties for HR processes that are beyond standard clerical duties (e.g., "may prepare eligible list package," and "acts as test proctor for written tests...") City's class description has more general clerical duties and Port's describes elevated HR-related clerical duties. Education and experience requirements are the same.
City Human Resource Clerk	Comp-3	750		N	1-2	200	2-2	125	3-1	25	4-2	75	5-1	25	1200	
Port Human Resources Assistant	Comp-3	750		N	1-2	200	2-2	125	3-1	25	4-2	75	5-1	25	1200	The class description for the City's class is focused more on general clerical duties whereas the Port's description drills down into the clerical duties within the HR project lifecycle. However, the function of the two classes is comparable given the application of those clerical duties applied to the area(s) of assignment within the HR department. Port's class requires an Associate's degree and three years of experience while the City's class requires HS diploma and two years of experience.
City Human Resource Clerk	Comp-3	750		N	1-2	200	2-2	125	3-1	25	4-2	75	5-1	25	1200	
Port Human Resource Technician	Comp-4	1250		N	1-3	350	2-2	125	3-2	125	4-2	75	5-2	75	2000	Overall duties and level of responsibility are very similar between these two classes; however, the depth of the series at the City raises the question as to how much responsibility the City class has since there are two other levels within the series which do not exist in the Port. Typically, the deeper the class series the narrower the scope of responsibility for the lower level(s) within the series.
City Human Resource Technician	Comp-4	1250		N	1-3	350	2-2	125	3-2	125	4-2	75	5-2	75	2000	
Port Human Resource Technician	Comp-0	0		N	1-3	350	2-2	125	3-2	125	4-2	75	5-2	75	750	The duty statements on the City's class description are so limited that it is difficult to discern what incumbents do outside of support work related to employee service

Supervision Legend:

- N = None
- L = Lead
- D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS
Human Resources Management Occupational Grouping

City Human Resource Technician, Senior	Comp-0	0		L	1-3	350	2-2	125	3-2	125	4-2	75	5-3	150	825	awards and employee training activities. Based on the class definition, one can infer that there are a number of functional areas for which incumbents have responsibility which are not described in the list of typical duties. For that reason, it is difficult to discern how similar (or dissimilar) the classes are.
Port Training/Development Specialist	Comp-3	750		L	1-6	950	2-2	125	3-3	275	4-3	150	5-3	150	2400	The supervisory controls for both classes seems inaccurate considering the body of work performed and it is the score for this component that constitutes the large difference in scores between the classes. The overall purpose and function of the classes is similar.
City Training Coordinator	Comp-3	750		N	1-6	950	2-4	450	3-3	275	4-3	150	5-3	150	2725	

Supervision Legend:

- N = None
- L = Lead
- D = Direct



October 5, 2018

Point Factor Analysis –
Classification Comparison –
Human Resources Management
Occupational Grouping

Draft Report

Port of Oakland/City of Oakland

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- Appendix I: Factor Evaluation System Description
- Appendix II: Classification Comparability Analysis



EXECUTIVE SUMMARY

Background

In January 2016, the Port of Oakland (“Port”) contracted with Koff & Associates (“K&A”) to conduct a comparative classification study to compare approximately three hundred (300) of the Port’s classifications to approximately three hundred (300) classifications in the City of Oakland’s (“City”) classification system. This classification review process was precipitated by the interest of the Civil Service Board in determining if the list of common classes found in Appendix B of the Personnel Manual of the Civil Service Board (also referred to as Civil Service Rules) has the potential of being expanded to include additional common classifications between the two classification systems.

The goal of the comparison classification study is:

- To analyze the Port of Oakland’s approximately three hundred (300) existing classifications through a comprehensive review of existing classification descriptions;
- To analyze the City of Oakland’s approximately three hundred (300) corresponding classifications through a comprehensive review of existing classification descriptions;
- To compare the Port’s and City’s classifications to determine if there are classifications within the respective agencies’ classification systems that are sufficiently similar in the nature and complexity of the duties performed, scope of responsibility, and qualifications required to be identified as common classifications in Appendix B of the Civil Service Rules.

To this end, K&A proposed a rating system by which to assign scores to each classification in order to facilitate an objective numerical comparison of each of the Port’s classifications to the corresponding City classification. The system utilizes six factors (identified and defined in the section of this report entitled “Point Factor Analysis”) on which to rate classifications and derive a numerical score for each. At the direction of the Port and City, monthly salary and salary differential information has been included in this report for informational purposes, but were not used as a factor by which commonality was rated. Following the Port, City, and Civil Service Board’s review of K&A’s proposed rating system, analysis commenced in January 2018.



CLASSIFICATION COMPARISON STUDY PROCESS

Occupational Groupings

K&A employed the use of occupational groupings whereby classifications were grouped into categories based on bodies of work in order to identify which classifications may be performing the same or substantively similar work. The occupational groupings and the approximate number of Port and City classes within each grouping can be found in Table 1.

Table 1. Occupational Groupings

Occupational Grouping	Approximate Number of Port Classifications	Approximate Number of City Classifications
<i>Human Resources Management</i>	9	26
General Administrative, Clerical and Office (including graphics and production)	22	21
Accounting and Budget	17	28
Engineering, Architecture, Planning and Permitting	45	33
Information Technology	20	34
Business and industry (including purchasing, contracts, marketing, workers’ compensation, property management and public affairs)	20	14
Inspection, Investigation, Enforcement, Compliance	6	9
Trades	37	52

K&A was directed to analyze and report findings on the Accounting and Budget occupational grouping first, followed by periodic analysis and reporting on each of the remaining occupational groupings.



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Point Factor Analysis

In order to develop a numerical score for each classification, K&A utilized the Factor Evaluation System (FES) to assign ratings to each classification based on the following six (6) factors:

- **Comparability** – Based on the broad comparability of the first ten (10) duty statements in each classification specification.
- **Knowledge required** – Measures the nature and extent of information or facts that an employee must understand to do acceptable work (e.g., steps, procedures, practices, rules, policies, theories, principles, and concepts) and the nature and extent of the skills needed to apply this knowledge.
- **Supervisory controls** – The nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility, and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.
- **Guidelines** – The nature of guidelines and the judgment needed to apply them. Guides used in occupations may include desk manuals, established procedures and policies, traditional practices, and reference materials.
- **Complexity** – The nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done, and the difficulty and originality involved in performing the work.
- **Scope and Effect** – The relationship between the nature of the work (i.e., the purpose, breadth, and depth of the assignment) and the effect of the work products or services both within and outside of the organization.

Within each factor, there are several levels with defined criteria for each level and a corresponding point value. A complete description of each factor along with the levels, criteria, and points are provided in Appendix I.

Each classification was rated and assigned a score for each factor based on the information provided in the class specifications, and the individual factor scores were totaled to reach a final score for each classification. Final scores for classifications with the same or similar titles in the Port and the City were compared to determine the likeness of the classifications. Generally, classifications with scores within ten percent (10%) of each other are considered to have significant overlap in function, roles, and responsibilities and are sufficiently similar to be identified as common classifications.



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Human Resources Management Occupational Grouping –
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FINDINGS

Comparison Classifications: Human Resources Management Group

Tables 2 and 3 display the Port and City classifications, respectively, that are categorized in the Human Resources Management occupational grouping. Each of the Port’s classifications was evaluated to determine whether there is a potential comparison classification at the City, and the findings of this evaluation are included in the following tables.

Table 2. Port Classifications – Human Resources Management Occupational Grouping

Port Classification Title	Potential Comparable Class – City
Human Resource Supervisor	Human Resource Analyst, Principal
Human Resource Supervisor (Labor Relations)	No Comparable Classification
Port Assistant Human Resource Analyst	Human Resource Analyst, Assistant
Port Human Resource Analyst	Human Resource Analyst
Port Human Resource Clerk	Human Resource Clerk
Port Human Resource Operations Technician	-Human Resource Operations Technician -Human Resource Operations Technician, Senior
Port Human Resource Technician	Human Resource Technician
Port Human Resources Assistant	Human Resource Clerk
Port Senior Human Resource Analyst	Human Resource Analyst, Senior
Training/Development Specialist	Training Coordinator

Table 3. City Classifications – Human Resources Management Occupational Grouping

City Classification Title	Potential Comparable Class – Port
Benefits Analyst	No Comparable Classification
Benefits Coordinator	No Comparable Classification
Benefits Representative	No Comparable Classification
Benefits Technician	No Comparable Classification



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City Classification Title	Potential Comparable Class – Port
Disability Benefits Coordinator	No Comparable Classification
Employee and Labor Relations Analyst, Senior	No Comparable Classification
Employee Relations Analyst Principal	No Comparable Classification
Equal Employment Opportunities Officer	No Comparable Classification
Equal Opportunity Specialist	No Comparable Classification
Human Resource Analyst	Port Human Resource Analyst
Human Resource Analyst, Assistant	Port Assistant Human Resource Analyst
Human Resource Analyst, Principal	Human Resource Supervisor
Human Resource Analyst, Senior	Port Senior Human Resource Analyst
Human Resource Clerk	-Port Human Resource Clerk - Port Human Resources Assistant
Human Resource Operations Supervisor	No Comparable Classification
Human Resource Operations Technician	Port Human Resource Operations Technician
Human Resource Operations Technician, Senior	Port Human Resource Operations Technician
Human Resource Systems Analyst	No Comparable Classification
Human Resource Systems Analyst, Senior	No Comparable Classification
Human Resource Systems Analyst, Supervisor	No Comparable Classification
Human Resource Technician	Port Human Resource Technician
Human Resource Technician, Senior	Port Human Resource Technician
Human Resource Technician, Supervisor	No Comparable Classification
Retirement Benefits Representative	No Comparable Classification
Training Coordinator	Training/Development Specialist

Following the identification of potential comparable classifications, we conducted a comprehensive evaluation of the classification specifications and rated each classification using the FES criteria and point values. Once point values were established for each classification, the



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values for each potential comparable class within the Port and City classification systems were compared to determine likeness between the classifications.

In some cases, we identified more than one potential match based on class title, and in those instances, we conducted a cursory review to determine if scoring comparison between the classifications was appropriate. In some instances, the cursory review revealed that a deeper comparison was not necessary (e.g., one class may be identified as entry level and another as journey level and qualification requirements were consistent with the level identified, in which case comparison scoring is not necessary). In other instances, cursory review did not eliminate the need for a deeper comparison and therefore a scoring comparison was conducted.

Comparability Scoring: Human Resources Management Group

Detailed scoring information for each classification can be found in Appendix II of this report. Table 4 provides a summary of the findings.

Table 4. Analysis Summary

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Human Resource Analyst, Assistant	3050	Port Assistant Human Resource Analyst	3050	0	0%
Human Resource Analyst	3575	Port Human Resource Analyst	3575	0	0%
Human Resource Analyst, Senior	4100	Port Senior Human Resource Analyst	4025	75	1.9%
Human Resource Analyst, Principal	4375	Human Resource Supervisor	3850	525	13.6%
Human Resource Clerk	1200	Port Human Resource Clerk	1100	100	9%
Human Resource Clerk	1200	Port Human Resources Assistant	1200	0	0%
Human Resource Technician	2000	Port Human Resource Technician	2000	0	0%
Human Resource Technician, Senior	825	Port Human Resource Technician	750	75	10%
Training Coordinator	2725	Training/Development Specialist	2400	325	13.5%



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Of note, the score for the City’s Human Resource Clerk and the Port Human Resource Technician classifications are different when compared to different classifications within the other agency. Since the comparability rating for any given classification is dependent upon the classification to which it is being compared, and since the final score includes the comparability rating, the final score for any given classification is not static and will be different from one comparison rating to another.

In general, those classifications with a ten percent (10%) or less differential between scores are considered sufficiently similar and may be identified as common classes.

Table 5 provides a crosswalk of the City and Port classifications which we believe are sufficiently similar to be identified as common classes based the final scores of each.

Table 5. Crosswalk of Similar Classifications

City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Human Resource Analyst, Assistant	\$6334	Port Assistant Human Resource Analyst	\$8882	0%	40.2%
Human Resource Analyst	\$7630	Port Human Resource Analyst	\$10,284	0%	34.8%
Human Resource Analyst, Senior	\$8658	Port Senior Human Resource Analyst	\$11,948	1.9%	38.0%
<i>Human Resource Clerk</i>	<i>\$4962</i>	<i>Port Human Resource Clerk</i>	<i>\$6728</i>	<i>9%</i>	<i>35.6%</i>
Human Resource Clerk	\$4962	Port Human Resources Assistant	\$6990	0%	40.9%
Human Resource Technician	\$5472	Port Human Resource Technician	\$8076	0%	47.6%



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City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
<i>Human Resource Technician, Senior</i>	\$6334	<i>Port Human Resource Technician</i>	\$8076	10%	27.5%

You will note that two classification pairings in Table 5 are italicized (City Human Resource Clerk/Port Human Resource Clerk and City Human Resource Technician, Senior/Port Human Resource Technician). Regarding the City’s Human Resource Clerk, while the differential from the Port Human Resource Clerk is within 10% and therefore the score for the pairing satisfies the criteria for being considered sufficiently similar, the differential between the City’s class and the Port Human Resources Assistant is much narrower at 0%. While there are significant similarities between the City’s Human Resource Clerk and the Port Human Resource Clerk, there is a much more substantial similarity between the City’s class and the Port Human Resources Assistant. The same is true for the City’s Human Resource Technician class series as compared to the Port’s Human Resource Technician series. While there are similarities between the senior level in the City’s Human Resource Technician series and the Port Human Resource Technician, there is a much more significant similarity between the Port’s class and the City’s Human Resource Technician (not the Senior level).

Also of note are the following observations made during the analysis of the listed classification pairings below:

- **City Human Resource Analyst, Assistant – Port Assistant Human Resource Analyst:** The Port classification description includes duty statements that are related to benefits administration which are not included in the City’s classification description since the City has separate classifications specific to benefits administration.
- **City Human Resource Analyst – Port Human Resource Analyst:** Similar to the Assistant series as provided above, the Port’s class has duty statements related to benefits administration as well as employee relations activities whereas the City’s does not since the City has classifications specific to those duties.

It is important to note that the analysis for this study is confined to the content of the classification descriptions and did not include obtaining information from classification incumbents or the assumption of duties and responsibilities outside of that which is provided in the classification description. To this end, Table 6 provides a list of classifications that we believe



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are likely sufficiently similar to be identified as common classes, but the classification descriptions are written such that the scores for the classifications do not reflect this similarity.

Table 6. Potentially Similar Classifications

City Classification	Port Classification	Discussion
Training Coordinator (\$8488/month)	Training/Development Specialist (\$10,820/month)	The supervisory controls for both classes seem inaccurate considering the body of work performed and it is the score for this component that produces the difference in scores between the classes. The overall purpose and function of the classes are similar, and if the supervisory controls were consistent with what we would typically expect to see for these bodies of work, then the scores would be the same with a 0% differential between the classes.

Next Steps

It is our assessment that the Port and the City can implement the addition of those classification pairings with a differential of five percent (5%) or less to Appendix B of the Civil Service Rules based on information provided in the classification specification. These classifications can be found in Table 7.

Table 7. Potentially Similar Classifications

City Classification	Port Classification
Human Resource, Assistant	Port Assistant Human Resource Analyst
Human Resource Analyst	Port Human Resource Analyst
Human Resource Analyst, Senior	Port Senior Human Resource Analyst
Human Resource Clerk	Port Human Resources Assistant
Human Resource Technician	Port Human Resource Technician

The two (2) classification pairings that fall toward the top of the ten percent (10%) differential range are:

- City: Human Resource Clerk / Port Human Resource Clerk
- City: Human Resource Technician, Senior / Port Human Resource Technician



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Typically, we would advise further analysis of these classification pairings based on the percentage differential; however, in this instance, classifications that are part of these pairings have been more closely matched in other pairings with a differential of zero percent (0%). Therefore, further analysis is not necessary.

We recommend further analysis of the classifications listed in Table 6 to determine the similarity between the classifications based on what we believe to be potentially inaccurate information in the classification description as it relates to the supervisory controls of the classes.

CONCLUSION

It has been a pleasure working with Port on this critical project. Once you have had the opportunity to review this draft report, please let us know if you have questions or need clarification on any of the information contained herein.

Respectfully submitted by,
Koff & Associates

A handwritten signature in blue ink that reads "Georg S. Krammer".

Georg Krammer
Chief Executive Officer



Appendix I

Factor Evaluation System Description



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Appendix II

**Classification Comparability Analysis
Human Resources Management Occupational Grouping**



October 4, 2018

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Classification Comparison –
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Draft Report

Port of Oakland/City of Oakland

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EXECUTIVE SUMMARY

Background

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- To compare the Port’s and City’s classifications to determine if there are classifications within the respective agencies’ classification systems that are sufficiently similar in the nature and complexity of the duties performed, scope of responsibility, and qualifications required to be identified as common classifications in Appendix B of the Civil Service Rules.

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CLASSIFICATION COMPARISON STUDY PROCESS

Occupational Groupings

K&A employed the use of occupational groupings whereby classifications were grouped into categories based on bodies of work in order to identify which classifications may be performing



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the same or substantively similar work. The occupational groupings and the approximate number of Port and City classes within each grouping can be found in Table 1.

Table 1. Occupational Groupings

Occupational Grouping	Approximate Number of Port Classifications	Approximate Number of City Classifications
Human Resources Management	10	26
General Administrative, Clerical and Office (including graphics and production)	22	21
<i>Accounting and Budget</i>	<i>17</i>	<i>28</i>
Engineering, Architecture, Planning and Permitting	45	33
Information Technology	20	34
Business and industry (including purchasing, contracts, marketing, workers’ compensation, property management and public affairs)	20	14
Inspection, Investigation, Enforcement, Compliance	6	9
Trades	37	52

K&A was directed to analyze and report findings on the Accounting and Budget occupational grouping first, followed by periodic analysis and reporting on each of the remaining occupational groupings.

Point Factor Analysis

In order to develop a numerical score for each classification, K&A utilized the Factor Evaluation System (FES) to assign ratings to each classification based on the following six (6) factors:

- **Comparability** – Based on the broad comparability of the first ten (10) duty statements in each classification specification.
- **Knowledge required** – Measures the nature and extent of information or facts that an employee must understand to do acceptable work (e.g., steps, procedures, practices,



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rules, policies, theories, principles, and concepts) and the nature and extent of the skills needed to apply this knowledge.

- **Supervisory controls** – The nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility, and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.
- **Guidelines** – The nature of guidelines and the judgment needed to apply them. Guides used in occupations may include desk manuals, established procedures and policies, traditional practices, and reference materials.
- **Complexity** – The nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done, and the difficulty and originality involved in performing the work.
- **Scope and Effect** – The relationship between the nature of the work (i.e., the purpose, breadth, and depth of the assignment) and the effect of the work products or services both within and outside of the organization.

Within each factor, there are several levels with defined criteria for each level and a corresponding point value. A complete description of each factor along with the levels, criteria, and points are provided in Appendix I.

Each classification was rated and assigned a score for each factor based on the information provided in the class specifications, and the individual factor scores were totaled to reach a final score for each classification. Final scores for classifications with the same or similar titles in the Port and the City were compared to determine the likeness of the classifications. Generally, classifications with scores within ten percent (10%) of each other are considered to have significant overlap in function, roles, and responsibilities and are sufficiently similar to be identified as common classifications.

FINDINGS

Comparison Classifications: Accounting and Budget Group

Tables 2 and 3 display the Port and City classifications, respectively, that are categorized in the Accounting and Budget occupational grouping. Each of the Port’s classifications was evaluated to determine whether there is a potential comparison classification at the City, and the findings of this evaluation are included in the following tables.



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Table 2. Port Classifications – Accounting and Budget Occupational Grouping

Port Classification Title	Potential Comparable Class – City
Account Clerk	Account Clerk II
Senior Account Clerk	Account Clerk III
Port Staff Accountant I	Accountant I
Port Staff Accountant II	Accountant II
Port Senior Accountant	Accountant III
Port Accounting Supervisor	Accounting Supervisor
Port Assistant Auditor	No Comparable Class
Port Associate Auditor	-Performance Auditor -Senior Performance Auditor
Port Senior Auditor	Senior Performance Auditor
Port Budget Coordinator	Budget and Operations Analyst III
Port Debt Compliance Analyst	No Comparable Classification
Port Debt Compliance Coordinator	No Comparable Classification
Port Finance Capital Program Coordinator	No Comparable Classification
Port Financial Analyst	Financial Analyst
Port Senior Financial Analyst	Financial Analyst
Pricing and Contracts Analyst	No Comparable Classification
Supervisor, Asset Management, Budget, and Financial Analysis	No Comparable Classification

Table 3. City Classifications – Accounting and Budget Occupational Grouping

City Classification Title	Potential Comparable Class – Port
Account Clerk I	No Comparable Classification
Account Clerk II	Account Clerk
Account Clerk III	Senior Account Clerk



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City Classification Title	Potential Comparable Class – Port
Accountant I	Port Staff Accountant I
Accountant II	Port Staff Accountant II
Accountant III	Port Senior Accountant
Accounting Supervisor	Port Accounting Supervisor
Accounting Technician	No Comparable Classification
Assistant Budget Analyst	No Comparable Classification
Budget and Grants Administrator	No Comparable Classification
Financial Analyst	-Port Financial Analyst -Port Senior Financial Analyst
Financial Analyst, Principal	No Comparable Classification
Fiscal Operations Supervisor	No Comparable Classification
Internal Auditor III	No Comparable Classification
Payroll Control Specialist	No Comparable Classification
Payroll Personnel Clerk I	No Comparable Classification
Payroll Personnel Clerk II	No Comparable Classification
Payroll Personnel Clerk III	No Comparable Classification
Revenue Analyst	No Comparable Classification
Revenue Analyst, Principal	No Comparable Classification
Revenue Assistant	No Comparable Classification
Revenue Operations, Supervisor	No Comparable Classification
Systems Accountant III	No Comparable Classification
Treasury Analyst I	No Comparable Classification
Treasury Analyst II	No Comparable Classification
Treasury Analyst III	No Comparable Classification

Following the identification of potential comparable classifications, we conducted a comprehensive evaluation of the classification specifications and rated each classification using



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the FES criteria and point values. Once point values were established for each classification, the values for each potential comparable class within the Port and City classification systems were compared to determine likeness between the classifications.

In some cases, we identified more than one potential match based on class title, and in those instances, we conducted a cursory review to determine if scoring comparison between the classifications was appropriate. In some instances, the cursory review revealed that a deeper comparison was not necessary (e.g., one class may be identified as entry level and another as journey level and qualification requirements were consistent with the level identified, in which case comparison scoring is not necessary). In other instances, cursory review did not eliminate the need for a deeper comparison and therefore a scoring comparison was conducted.

Comparability Scoring: Accounting and Budget Group

Detailed scoring information for each classification can be found in Appendix II of this report. Table 4 provides a summary of the findings.

Table 4. Analysis Summary

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Account Clerk II	950	Account Clerk	950	0	0%
Account Clerk III	1775	Senior Account Clerk	1775	0	0%
Accountant I	1875	Port Staff Accountant I	2175	300	16%
Accountant II	2975	Port Staff Accountant II	2975	0	0%
Accountant III	2875	Port Senior Accountant	2625	250	9.5%
Accounting Supervisor	3275	Port Accounting Supervisor	3275	0	0%
Budget and Operations Analyst III	3475	Port Budget Coordinator	3475	0	0%
Financial Analyst	3575	Port Financial Analyst	2550	1025	40%
Financial Analyst	4075	Port Senior Financial Analyst	3775	300	8%
Performance Auditor, Senior	2650	Port Associate Auditor	2150	500	23%



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Of note, the score for the City’s Financial Analyst classification is different when compared to the Port Senior Financial Analyst than when compared to the Port Financial Analyst. Since the comparability rating for any given classification is dependent upon the classification to which it is being compared, and since the final score includes the comparability rating, the final score for any given classification is not static and will be different from one comparison rating to another.

In general, those classifications with a ten percent (10%) or less differential between scores are considered sufficiently similar to be identified as common classes.

Table 5 provides a crosswalk of the City and Port classifications which we believe are sufficiently similar to be identified as common classes based the final scores of each.

Table 5. Crosswalk of Similar Classifications

City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Account Clerk II	\$4843	Account Clerk	\$6594	0%	36.2%
Account Clerk III	\$5469	Senior Account Clerk	\$7561	0%	38.3%
Accountant II	\$7604	Port Staff Accountant II	\$9762	0%	28.4%
Accountant III	\$8392	Port Senior Accountant	\$11,403	9.5%	35.9%
Accounting Supervisor	\$9356	Port Accounting Supervisor	\$12,514	0%	33.8%
Budget and Operations Analyst III	\$9359	Port Budget Coordinator	\$12,514	0%	33.8%
Financial Analyst	\$10,318	Port Senior Financial Analyst	\$11,403	8%	10.5%

It is important to note that the analysis for this study is confined to the content of the classification descriptions and did not include obtaining information from classification incumbents or the assumption of duties and responsibilities outside of that which is provided in the classification description. To this end, Table 6 provides a list of classifications that we believe are likely sufficiently similar to be identified as common classes, but the classification descriptions are written such that the scores for the classifications do not reflect this similarity.



Table 6. Potentially Similar Classifications

City Classification	Port Classification	Discussion
Accountant I (\$6616/mo.)	Port Staff Accountant I (\$8349/mo.)	The supervisory controls of the City’s classification are not aligned with industry standards for professional-level classifications. We believe that this classification is likely to receive general supervision versus the immediate supervision indicated in the classification description. If the supervisory controls were aligned with industry standards for this classification, the score for the City’s Accountant I would be 1975 which represents a 200-point difference (or 10%) from the Port Staff Accountant I and the classes could therefore be identified as common classes.
Performance Auditor-Senior (\$8488/mo.)	Port Associate Auditor (\$9759/mo.)	Similarly, to the Accountant I/Port Staff Accountant I scenario, the supervisory controls for each of these classifications do not align with industry standards. If this factor was adjusted, the differential between the two classifications would be 7.6% and the classifications could be identified as common classes.

Next Steps

It is our assessment that the Port and the City can implement the addition of those classification pairings with a zero percent (0%) differential to Appendix B of the Civil Service Rules based on information provided in the classification specification. These classifications are:

- City: Account Clerk II / Port: Account Clerk
- City: Account Clerk III / Port: Senior Account Clerk
- City: Accountant II / Port Staff Accountant II
- City: Accounting Supervisor / Port Accounting Supervisor
- City: Budget and Operations Analyst III / Port Budget Coordinator

For the two (2) classification pairings that fall toward the top of the ten percent (10%) differential range, we recommend that further analysis of these classifications including interviews of incumbents of the classifications be conducted to verify the similarity of the classifications which include:

- City: Accountant III / Port Senior Accountant
- City: Financial Analyst / Port Senior Financial Analyst



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In addition, we recommend further analysis of the classifications listed in Table 6 to determine the similarity between the classifications based on what we believe to be potentially inaccurate information in the classification description as it relates to the supervisory controls of the classes.

CONCLUSION

It has been a pleasure working with Port on this critical project. Once you have had the opportunity to review this draft report, please let us know if you have questions or need clarification on any of the information contained herein.

Respectfully submitted by,
Koff & Associates

A handwritten signature in blue ink that reads "Georg S. Krammer".

Georg Krammer
Chief Executive Officer



Appendix I

Factor Evaluation System Description



Appendix II

Classification Comparability Analysis Accounting and Budget Occupational Grouping

City of Oakland/Port of Oakland Comparability of Duties and Responsibilities

Based Upon Broad Comparability First Ten Duty Statements in Class Specification

Level	Measure	Points	Comments
Comp-1	Two (2) of ten statements are sufficiently similar as to be comparable	50	Same points as Level 1 of Knowledge Matrix
Comp-2	Four (4) of ten statements are sufficiently similar as to be comparable	350	Same points as Level 3 of Knowledge Matrix
Comp-3	Six (6) of ten statements are sufficiently similar as to be comparable	750	Same points as Level 5 of Knowledge Matrix
Comp-4	Eight (8) of ten statements are sufficiently similar as to be comparable	1250	Same points as Level 7 of Knowledge Matrix
Comp-5	Ten (10) of ten statements are sufficiently similar as to be comparable	1850	Same points as Level 9 of Knowledge Matrix

- Sufficiently similar means that, although the duties may be written differently, a reasonable conclusion can be drawn that the statements are comparable, based upon the intent of the overall statements.
- Requires an objective interpretation, but may be perceived as subjective.

FES Factor 1 - Knowledge Required by the Position

Measures the nature and extent of information or facts that a worker must understand to do acceptable work, e.g., steps, procedures, practices, rules, policies, theories, principles and concepts, and the nature and extent of the skills needed to apply this knowledge. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

Level	Description	Points
1-1	<p>Knowledge of simple, routine or repetitive tasks or operations that typically include following step-by-step instructions and require little or no previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Skill to operate simple equipment or equipment that operates repetitively and requires little or no previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	50
1-2	<p>Knowledge of basic or commonly used rules, procedures or operations that typically require some previous training or experience;</p> <p style="text-align: center;">OR</p> <p>Basic skill to operate equipment requiring some previous training or experience, such as keyboard equipment;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	200
1-3	<p>Knowledge of a body of standardized rules, procedures and operations that require considerable training and experience to perform the full range of standard clerical assignments and resolve recurring problems;</p> <p style="text-align: center;">OR</p> <p>Skill acquired through considerable training and experience, to operate and adjust varied equipment for purposes such as performing numerous standardized tests or operations;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	350
1-4	<p>Knowledge of an extensive body of rules, procedures or operations that require extended training and experience to perform a wide variety of interrelated or non-standard procedural assignments and resolve a wide range of problems;</p> <p style="text-align: center;">OR</p> <p>Practical knowledge of standard procedures in a technical field, requiring extended training or experience, to perform such work as adapting equipment when this requires consideration of the functioning characteristics of equipment; interpreting results of tests based on previous experience and observations (rather than directly reading instruments or other measures); or extracting information from various sources when this requires considering the applicability of the information and characteristics and quality of the sources;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	550
1-5	<p>Knowledge (such as would be acquired through pertinent education, experience, training or independent study), of basic principles, concepts, and methodology of a professional or administrative occupation, and skill in</p>	750

Level	Description	Points
	<p>applying this knowledge in carrying out elementary assignments, operations, or procedures;</p> <p style="text-align: center;">OR</p> <p>In addition to the practical knowledge of standards 1-4, practical knowledge of technical methods to perform assignments such as carrying out limited projects that involve use of specialized complicated techniques;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	
1-6	<p>Knowledge of the principles, concepts and methodology of a professional or administrative occupation as described in Level 1-5 that has either been (a) supplemented by skill gained through job experience to permit independent performance of recurring assignments, or (b) supplemented by expanded professional or administrative knowledge gained through relevant education or experience, that has provided skill in carrying out assignments, operations and procedures that are significantly more difficult and complex than those covered by level 1-5;</p> <p style="text-align: center;">OR</p> <p>Practical knowledge of a wide range of technical methods, principles and practices similar to a narrow area of a professional field; and skill in applying this knowledge to such assignments as the design and planning of difficult, but well precedented projects;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	950
1-7	<p>Knowledge of a wide range of concepts, principles and practices of a professional or administrative occupation, such as would be gained through extended study or experience, and skill in applying this knowledge to difficult and complex work assignments;</p> <p style="text-align: center;">OR</p> <p>A comprehensive, intensive, practical knowledge of a technical field, and skill in applying this knowledge to the development of new methods, approaches or procedures.</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,250
1-8	<p>Mastery of a professional or administrative field to:</p> <ul style="list-style-type: none"> • Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods; <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Make decisions or recommendations significantly changing, interpreting, or developing important public policies or programs; <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,550
1-9	<p>Mastery of a professional field to generate and develop new hypotheses and theories;</p> <p style="text-align: center;">OR</p> <p>Equivalent knowledge and skill.</p>	1,850

FES Factor 2 - Supervisory Controls

Supervisory controls covers the nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.

Responsibility of the employee depends on the extent to which the employee is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing the priorities and defining objectives. The degree of review of completed work depends on the nature and extent of the review, e.g., close and detailed review of each phase of the assignment, detailed review of the finished assignment, spot-check of finished work for accuracy, or review for adherence to policy.

Level	Description	Points
2-1	<p>For both one-of-a-kind and repetitive tasks, the supervisor makes specific assignments that are accompanied by clear, detailed and specific instructions.</p> <p>The employee works as instructed and consults with the supervisor as needed on all matters not specifically covered in the original instructions or guidelines.</p> <p>For all positions the work is closely controlled. For some positions, the control is through the structured nature of the work itself; for others, it may be controlled by the circumstances in which it is performed. In some situations, the supervisor maintains control through review of the work. This may include checking progress or reviewing completed work for accuracy, adequacy, and adherence to instructions and established procedures.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Immediate Supervision 	25
2-2	<p>The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments, including suggested work methods of advice on source material available.</p> <p>The employee uses initiative in carrying out recurring assignments independently without specific instructions, but refers deviations, problems and unfamiliar situations not covered by instructions to the supervisor for decision or help.</p> <p>The supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increases with more difficult assignments if the employee has not previously performed similar assignments.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • General Supervision 	125

Level	Description	Points
2-3	<p>The supervisor makes assignments by defining objectives, priorities and deadlines and assists the employee with unusual situations that do not have clear precedents.</p> <p>The employee plans and carries out the successive steps and handles problems and deviations in the work assignments in accordance with instructions, policies, previous training, or accepted practices in the occupation.</p> <p>Completed work is usually evaluated for technical soundness, appropriateness, and conformity to policy and requirements. The methods used in arriving at the end results are not usually reviewed in detail.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Direction 	275
2-4	<p>The supervisor sets the overall objectives and resources available. The employee and supervisor in consultation, develop deadlines, projects and work to be done.</p> <p>The employee, having developed expertise in the line of work, is responsible for planning and carrying out the assignment, resolving most of the conflicts that arise, coordinating the work with others as necessary, and interpreting policy on own initiative in terms of established objectives. In some assignments, the employee also determines the approach to be taken and the methodology to be used. The employee keeps the supervisor informed of progress and potentially controversial matters.</p> <p>Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, or effectiveness in meeting requirements or expected results.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • General direction 	450
2-5	<p>The supervisor provides administrative direction with assignments in terms of broadly defined missions or functions.</p> <p>The employee has responsibility for independently planning, designing and carrying out programs, projects, studies, or other work.</p> <p>Results of the work are considered technically authoritative and are normally accepted without significant change. If the work should be reviewed, the review concerns such matters as fulfillment of program objectives, effect of advice and influence of the overall program, or the contribution to the advancement of technology. Recommendations for new projects and alterations of objectives usually are elevated for such considerations as availability of funds and other resources, broad program goals, or national priorities.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> • Administrative direction 	650

FES Factor 3 – Guidelines

This factor covers the nature of guidelines and the judgment needed to apply them. Guides used in occupations include, for example, desk manuals, established procedures and policies, traditional practices and reference materials such as dictionaries, style manuals, engineering handbooks, and pharmacopoeia.

Individual jobs in different occupations vary in the specificity, applicability and availability of guidelines for performance of assignments. Consequently, the constraints and judgmental demands placed on employees may also vary. For example, the absence of specific instructions, procedures and policies may limit the employee’s opportunity to make or recommend decisions, or actions. However, in the absence of procedures under broadly stated objectives, employees in some occupations may use considerable judgment in researching literature and developing new methods.

Guidelines should not be confused with the knowledge described under Factor 1, Knowledge Required by the Position. Guidelines either provide reference data or impose certain constraints on the use of knowledge. For example, in the field of medical technology, for a particular diagnosis, there may be three or four standardized tests set forth in the technical manual. A medical technologist is expected to know these diagnostic tests. However, in a given laboratory, the policy may be to use only one of the tests, or the policy may state specifically under what conditions one or the other of these tests may be used.

Level	Description	Points
3-1	<p>Specific detailed guidelines covering all important aspects of the assignment are provided to the employee.</p> <p>The employee works in strict adherence to guidelines; deviations must be authorized by the supervisor.</p>	25
3-2	<p>Procedures for doing the work have been established, and a number of specific guidelines are available.</p> <p>The number and similarity of guidelines and work situations require the employee to use judgment in locating and selecting the most appropriate guidelines, references and procedures for application and in making minor deviations to adapt the guidelines to specific cases. The employee may also determine which of the several established guidelines to use. Situations to which the existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor.</p>	125
3-3	<p>Guidelines are available but are not completely applicable to the work or have gaps in specificity.</p> <p>The employee uses judgment in interpreting and adapting guidelines, such as agency policies, regulations, precedents, and work directions for application to specific cases or problems. The employee analyzes results and recommends changes.</p>	275
3-4	<p>Administrative policies and precedents are applicable but are stated in general terms. Guidelines for performing the work are scarce or of limited use.</p>	450

Level	Description	Points
	The employee uses initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies.	
3-5	<p>Guidelines are broadly stated and non-specific, e.g., broad policy statements and basic legislation that require extensive interpretation.</p> <p>The employee must use judgment and ingenuity in interpreting the intent of the guides that do exist and in developing applications to specific areas of work. Frequently, the employee is recognized as a technical authority in the development and interpretation of guidelines.</p>	650

FES Factor 4 - Complexity

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level	Description	Points
4-1	<p>The work comprises of tasks that are clear cut and directly related.</p> <p>There is little or no choice to be made in deciding what needs to be done.</p> <p>Actions to be taken or responses to be made are readily discernible. The work is quickly mastered.</p>	25
4-2	<p>The work consists of duties that involve related steps, processes or methods.</p> <p>The decision regarding what needs to be done involves various choices that require the employee to recognize the existence of, and differences among, a few easily recognizable situations.</p> <p>Actions to be taken, or responses to be made, differ in such things as the source of information, the kind of transactions or entries, or other differences of a factual nature.</p>	75
4-3	<p>The work includes various duties involving different and unrelated processes and methods.</p> <p>The decision regarding what needs to be done depends upon the analysis of the subject, phase or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives.</p> <p>The work involves conditions and elements that must be identified and analyzed to discern interrelationships.</p>	150
4-4	<p>The work typically involves varied duties that require many different and unrelated processes and methods, such as those related to well-established aspects of an administrative or professional field.</p> <p>Decisions regarding what needs to be done include the assessment of unusual circumstances, variations in approach, and incomplete or conflicting data.</p> <p>The work requires making many decisions concerning such things as the interpretation of considerable data, planning of the work, or refinement of the methods and techniques to be used.</p>	225
4-5	<p>The work includes varied duties requiring many different and unrelated processes and methods that are applied to a broad range of activities or substantial depth of analysis, typically for an administrative or professional field.</p> <p>Decisions regarding what needs to be done include major areas of uncertainty in approach, methodology or interpretation and evaluation processes that result from such elements as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.</p>	325

Level	Description	Points
	The work requires originating new techniques, establishing criteria or developing new information.	
4-6	<p>The work consists of broad functions and processes of an administrative or professional field. Assignments are characterized by breadth and intensity of effort and involve several phases pursued concurrently or sequentially with the support of others within or outside the organization.</p> <p>Decisions regarding what needs to be done include largely undefined issues and elements and require extensive probing and analysis to determine the nature and scope of the problems.</p> <p>The work requires continuing efforts to establish concepts, theories, or programs, or to resolve unyielding problems.</p>	450

FES Factor 5 – Scope and Effect

Scope and Effect covers the relationship between the nature of the work, i.e., the purpose, breadth and depth of the assignment, and the effect of the work products or services both within and outside the organization.

Effect measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or impacts on the adequacy of research conclusions. The concept of effect alone does not provide sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture and allows consistent evaluations. Only the effect of properly performed work is to be considered

Level	Description	Points
5-1	<p>The work involves the performance of specific, routine, operations that include a few separate tasks or procedures.</p> <p>The work or service is required to facilitate the work of others; however, it has little impact beyond the immediate organizational unit or beyond the timely provision of limited services to others.</p>	25
5-2	<p>The work involves the execution of specific rules, regulations or procedures and typically comprises a segment of an assignment or project of broader scope.</p> <p>The work or service product affects the accuracy, reliability, or acceptability of further processes or services.</p>	75
5-3	<p>The work involves treating a variety of conventional problems, questions or situations in conformance with established criteria.</p> <p>The work product or service affects the design or operations of systems, programs or equipment; the adequacy of such activities as field investigations, testing operations, or research conclusions; or the social, physical and economic well being of people.</p>	150
5-4	<p>The work involves establishing criteria; formulating projects; assessing program effectiveness or investigating or analyzing a variety of unusual conditions, problems, or questions.</p> <p>The work product or service affects a wide range of agency activities, major activities or industrial concerns, or the operation of other agencies.</p>	225
5-5	<p>The work involves isolating and defining unknown conditions, resolving critical problems, or developing new theories.</p> <p>The work product or service affects the work of other experts, the development of major aspects of administrative or scientific programs or missions, or the well-being of substantial numbers of people.</p>	325
5-6	<p>The work involves planning, developing, and carrying out vital administrative or scientific programs.</p> <p>The programs are essential to the missions of the agency or affect a large number of people on a long term or continuing basis.</p>	450

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
City - Account Clerk II	2	350		N	1-2	200	2-2	125	3-2	125	4-2	75	5-2	75	950	These classifications are significantly similar despite their low comparability score. They are the same for all other factors and the low comparability score is affected in part by the criteria of comparing only the first 10 duty statements on the class description whereby there are the same or similar duty statements that appear deeper into the list of duty statements for the classifications.
Port - Account Clerk	2	350	N	N	1-2	200	2-2	125	3-2	125	4-2	75	5-2	75		
City - Account Clerk III	3	750		L	1-4	550	2-2	125	3-2	125	4-3	150	5-2	75	1775	These classifications are significantly similar. The comparability score would be higher with a comparison deeper into the duties list of the class description and all other factors are the same.
Port - Senior Account Clerk	3	750	N	L	1-4	550	2-2	125	3-2	125	4-3	150	5-2	75		
City - Accountant I	3	750		N	1-5	750	2-1	25	3-2	125	4-2	75	5-3	150	1875	For professional classifications, the level of supervision received would typically be general supervision. The City's classification was rated based on the way that the class description is written; however, if the level of supervision was aligned with the professional nature of this classification, the City's classification would be scored at 1975 for a 10% differential between the two classes. We believe that consolidation of these two classifications likely is appropriate.
Port - Staff Accountant I	3	750	N	N	1-6	950	2-2	125	3-2	125	4-2	75	5-3	150		
City - Accountant II	4	1250		L	1-6	950	2-2	125	3-3	275	4-4	225	5-3	150	2975	Supervisory control at this level should be 2-3 (275 points) for both classes. Level of supervisory control for these classes is inconsistent with the class series (see City's Accountant III and Port's Senior Accountant levels).

Supervision Legend:
N = None
L = Lead
D = Direct

Port - Staff Accountant II	4	1250		L	1-6	950	2-2	125	3-3	275	4-4	225	5-3	150	2975	These classifications are significantly similar and are appropriate for consolidation.
City - Accountant III	3	750		L	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225	2875	The City's class <i>establishes or revises</i> procedures in compliance with law and/or GAAP whereas the Port's class <i>recommends</i> changes to procedures. Port's class requires an additional year of experience. City's class requires knowledge of legal terminology and commercial law. Port's class emphasizes supervisory duties.
Port - Senior Accountant	3	750	E	L	1-6	950	2-3	275	3-3	275	4-4	225	5-3	150	2625	Point values indicate that the classes are substantively similar with a 9.5% differential and are appropriate for consolidation.
City - Accounting Supervisor	3	750		D	1-7	1250	2-3	275	3-4	450	4-5	325	5-4	225	3275	These classifications are significantly similar. The comparability score would be higher with a comparison deeper into the duties list of the class description and all other factors are the same.
Port- Accounting Supervisor	3	750	E	D	1-7	1250	2-3	275	3-4	450	4-5	325	5-4	225	3275	
City- Financial Analyst	3	750		D	1-7	1250	2-3	275	3-5	650	4-5	325	5-5	325	3575	Substantial differences exist in level of responsibility and scope of work. City's classification performs duties that are more strategic in nature and have farther reaching impact in the organization (e.g., monitoring & analyzing legislation and making recommendations for City policy and economic decisions based on the same) whereas the Port's classification is more narrowly focused on tasks around the production of budgets. These classes are substantially different from one another.
Port- Financial Analyst	3	750	N	N	1-6	950	2-2	125	3-3	275	4-4	225	5-4	225	2550	

Supervision Legend:
N = None
L = Lead
D = Direct

City - Financial Analyst	4	1250		D	1-7	1250	2-3	275	3-5	650	4-5	325	5-5	325	4075	These classes are comparable overall with the City's class having impact at a slightly higher level within the organization with fewer guidelines for performing the work. Point values are within 8% of each other which is sufficiently similar and duty statements are very similar.
Port- Senior Financial Analyst	4	1250	E	D	1-7	1250	2-3	275	3-4	450	4-5	325	5-4	225	3775	
City- Performance Auditor, Senior	2	350		L	1-6	950	2-4	450	3-4	450	4-4	225	5-4	225	2650	Level of supervision indicated is contradictory in the class description for the City class and neither coincide with what we would typically expect to see in a journey-level professional class. Supervisory controls for the Port also differ from what would be considered typical for this level which is 2-3 (275 points). The scope of duties of the City's class are beyond auditing accounting & financial data & include audit & assessment of overall program performance using measures other than finances. However, if the supervisory controls for both classifications were aligned with what we would expect to see for this level of classifications, they would be scored within 7.6% of each other and would possibly be appropriate for consolidation.
Port- Associate Auditor	2	350	N	N	1-6	950	2-2	125	3-3	275	4-4	225	5-4	225	2150	
City- Budget and Operations Analyst III	4	1250		N	1-6	950	2-3	275	3-4	450	4-5	325	5-4	225	3475	These classifications are significantly similar.
Port- Budget Coordinator	4	1250	E	N	1-6	950	2-3	275	3-4	450	4-5	325	5-4	225	3475	

Supervision Legend:
N = None
L = Lead
D = Direct



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OFFICE OF THE CITY CLERK
OAKLAND

2018 NOV -1 PM 12: 19

AGENDA REPORT

TO: Sabrina B. Landreth
City Administrator

FROM: Ian Appleyard
Director, HRM

SUBJECT: Semi-Annual Vacancy Report

DATE: October 22, 2018

City Administrator Approval

Date:

11/1/18

RECOMMENDATION

Staff Recommends That The City Council Receive The Semi-Annual Informational Report On Budgeted Vacant Positions Through September 24, 2018.

EXECUTIVE SUMMARY

This is an informational report that provides an update on vacant positions as of September 24, 2018, which includes status of vacancies; market conditions; recruitment process, strategies and challenges; and workforce analysis. The total budgeted full-time positions was 4,447.67 FTE with 742.37 Full-Time Employee (FTE) positions vacant, resulting in a 16.69% vacancy rate. This report breaks down the status of each vacancy by department (**Attachment A**), the status of the 183.91 FTE positions that were added in FY 2018-19 (**Attachment B**), and the status of vacant positions in the Oakland Public Works Department and the Department of Transportation (**Attachment C**).

Human Resources Management (HRM) Department's recruitment priorities are set by the City Administrator, and, subsequently, in coordination with individual departments. In some instances, high priority recruitments do not correlate to high-volume recruitments and, therefore, may not reduce the overall vacancy rate.

BACKGROUND / LEGISLATIVE HISTORY

The Human Resources Management Department (HRM) provides a semi-annual report at the request of both the Finance and Management Committee and Public Works Committee. This report examines vacancy data as of September 24, 2018. HRM works closely with all City Departments to determine the precise status of all vacancies. This report also analyzes a number of additional elements that describe the City of Oakland's current vacancy situation.

ANALYSIS AND POLICY ALTERNATIVES

For the purposes of this report, vacancies are described as **non-encumbered** and **encumbered**. Non-encumbered means that the position is available to be filled. Encumbered

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F & MC and PWC
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means that the position's funding is tied to a specific purpose, such as overtime, temporary staffing, acting assignments or, in some cases, a continuous recruitment is being conducted.

As of September 24, 2018, there were 742.37 FTE positions vacant citywide with 220.12 FTE encumbered as described above. Therefore, 522.25 FTE are non-encumbered, yielding a citywide vacancy rate to 11.74% of positions.

In general, six percent to eight percent of positions are vacant at any one time. The percentage of vacant positions supports the budgeted "vacancy factor" of 0.0 percent to 8.5 percent, depending on the department. In the case of the Library, the budgeted vacancy factor is 8.5 percent. The budgeted vacancy factor is a percentage of a department's overall budgeted base salary costs. Additionally, this report regarding vacant positions always reflects a snapshot in time. The number of vacant positions and which positions are vacant changes constantly. The budgeted vacancy factor is a fixed ratio applied to the total base salary allocation for a given department. Therefore, the number of vacant positions does not correlate directly to the budgeted vacancy factor.

Status of Vacancies – City Wide

The vacancy rate increased from the previous vacancy report (April 24, 2018) because of the addition of 183.91 FTE to the FY 2018-19 Midcycle Adopted Budget. **Table 1** below shows all vacant positions (encumbered and non-encumbered), resulting in a 16.69% vacancy rate. **Table 2** shows only non-encumbered positions, resulting in a 11.74% vacancy rate.

Table 1: Citywide Vacancy Summary (Encumbered and Non-Encumbered)

Type	All Positions	Vacant	% Vacant
Total Sworn	1,434	205	14.30%
Total Miscellaneous	3,013.67	537.37	10.31%
Total	4,447.67	742.37	16.69%

Table 2: Citywide Vacancy Summary (Non-Encumbered Only)

Type	All Positions	Vacant	% Vacant
Total Sworn	1,434	64	4.46%
Total Miscellaneous	3,013.67	458.25	15.21%
Total	4,447.67	522.25	11.74%

The non-encumbered vacancy rate (**Table 2**) is the historic data point for the report. **Table 3** shows the non-encumbered rate reported since May 14, 2012. HRM has not tracked the historical city-wide vacancy rate (encumbered and non-encumbered).

Vacancy Report Date	# of budgeted positions	# non-encumbered vacancies	% Vacant
5/14/12	3,796.53	259.88	6.88%
5/20/13	3,813.39	295.88	7.75%
9/22/14	3,937.26	341.01	8.66%
10/5/15	4,151.78	432.72	10.42%
10/24/16	4,186.84	377.07	9.00%
11/14/17	4,279.22	406.70	9.50%
4/24/18	4,282.97	419.50	9.79%
11/13/18	4,447.67	522.25	11.74%

When Departments submit vacancy information, standard descriptors are available from which to choose. **Table 4** is a summary of vacancy status, sorted by most frequent (Recruitment Plan in Progress) to least (Hire Authorization in Progress). The most frequent status is encumbered vacancies (220.12), which is broken down more specifically below. "Recruitment Plan in Progress" means the vacancy is in the planning stage either at HRM or within a department (exempt from civil service). "Requisition Pending Approval" is the queue for HRM management to assign to an analyst. There can be multiple requisitions for one classification.

Table 4: Summary of Vacancy Status	
Status of Vacancy	FTE
Recruitment Plan in Progress	119.23
Requisition Pending Approval	89.77
Encumbered (Continuous Academies)	85.00
Depart Interview Process	64.60
Recruitment Open (application intake)	55.53
On Hold (by Dept)	51.14
Approved (pending HR assignment)	31.00
Encumbered (Dept Interview/FF Trainee)	29.00
Encumbered	28.13
Encumbered (Temp staffing)	29.00
Eligible List Referred to Dept	22.00
Encumbered (OT for minimum staffing)	21.00
Inactive (no immediate plans to fill)	20.23
Job Offer Extended	16.00
On Hold (Job spec revisions or FEHA)	16.00
Encumbered (linked to PT class)	14.99
Encumbered (underfilled)	13.00
Recruitment Closed (screening apps)	12.00
Eligible List Available	11.00
HR Assessment & Scoring	10.00
Hire Authorization in Progress	3.75
Total:	742.37

Status of Vacancies – Departments

Table 5 shows the total vacancy rate by department, sorted by high to low percentage, with outliers below. As noted above, there are cases where vacancies are encumbered within each department. For example, the Fire Department has 29 vacant positions encumbered for Firefighter Trainee, and 20 vacant positions encumbered for minimum staffing overtime. The Police Department has 85 vacant positions encumbered for the Police Officer Trainee classification.

Table 5: Vacancy Rates by Department			
City of Oakland Departments	No. of Authorized positions (FTE)	No. of vacant positions (FTE)	Vacancy Rate
Library*	275.27	78.94	28.68%
Housing & Community Dev	68.50	17.50	25.55%
Planning & Building	172.50	41.00	23.77%
Transportation	317.04	74.25	23.42%
Police Commission	14.00	3.00	21.43%
Public Works	631.57	111.52	17.66%
City Administrator	79.10	13.10	16.56%
Human Services	236.93	39.16	16.53%
Human Resources	49.00	8.00	16.33%
Economic & Workforce Dev	51.60	8.00	15.50%
Police	1,310.50	189.50	14.46%
Fire	612.10	85.55	13.98%
Finance	160.00	22.00	13.75%
Parks & Recreation**	228.14	30.41	13.33%
Information Technology	81.00	10.00	12.35%
City Auditor	10.00	1.00	10.00%
Mayor	13.00	1.00	7.69%
City Attorney	77.00	4.00	5.19%
City Council	30.92	0.44	1.42%
City Clerk	17.50	0.00	0.00%
Public Ethics Commission	6.00	0.00	0.00%
Violence Prevention	3.00	3.00	100.00%
Race & Equity	3.00	1.00	33.33%
Citywide Vacancy Rate	4,447.67	742.37	16.69%

*Reduced vacancies by 4.74 to accommodate Library part-time staffing

**Reduced vacancies by 17.44 to accommodate OPR part-time staffing

National and Regional Market Conditions

According to the latest Bureau of Labor Statistics, the nation's unemployment rate is 3.9%, the lowest since 1969. The racial breakdown of national unemployment for white is 3.4%; black or African American is 6.5%; for Asian is 3.3%; and Latino or Hispanic is 4.5%.

According to Employment Development Department, the California unemployment rate is 4.1%, the lowest since 1976. The Oakland-Fremont-Hayward area has a 3.1% unemployment rate. These conditions are a significant issue when recruiting for qualified and diverse candidates in the public sector.

The California International City/County Management Association (Cal-ICMA) recently published its Talent Initiative Report (**Attachment D**) which concludes that talent development has now become a key business imperative for local governments. Based on the report, there are eight key findings, many of which apply to the City of Oakland:

1. In the face of the baby-boomer "retirement wave," local governments have not adequately built a talent pipeline.
2. Local governments can no longer rely on "stealing" talent from other agencies. More than ever, public agencies need to grow their own talent.
3. Based on the meaning and purpose of our work, local government has a competitive advantage in attracting and retaining talent. However, we in local government are not telling our story.
4. Talent retention is largely about learning, challenge and engagement. Employees who are learning and growing are more likely to stay with an organization.
5. Talent development happens in the middle. The problem is that mid-managers typically do not perceive developing talent and coaching direct reports as primary functions.
6. Retooling organizational cultures to better attract and retain early-career talent will enhance our organizations for all employees and improve performance and productivity.
7. Winning the war for talent is more about culture than money.
8. The top development need for emerging leaders is "soft" leadership skills, including communication skills.

To understand how Oakland compares to regional jurisdictions, HRM surveyed nine agencies and received eight responses. The survey results, provided in **Table 6**, show that while there is a wide range of rates, the average regional vacancy rate is 16.19 percent.

Table 6: Surveyed Agencies Vacancy Rates

Comparator Agencies	No. of Depts	No. of Budgeted positions	No. of vacant positions	Vacancy Rate
City of Berkeley	18	1,496	234	15.64%
City of Concord	10	422	23	5.45%
Contra Costa County	23	10,763	1,855	17.23%
City of Fremont	14	937	92	9.82%
City of Hayward	13	913	102	11.19%
City of Richmond	24	756	50	6.61%
City & County of San Francisco*	49	37,132	6,500	17.51%
City of San Jose	23	6,412	668	10.42%
Regional Vacancy Rate Average		58,831	9,524	16.19%
City of Oakland	23	4,447	742	16.69%

**Vacancy data as of March 2018. Current data not available until mid to late November 2018.*

Common classifications that are difficult to recruit for from among the above jurisdictions include, Police Officer, Police Communications Dispatcher, Information Technology, skilled trades and engineer. The City of Oakland has difficulty recruiting for Head Start Instructors, skilled trades, equipment mechanics and internal services (human resources and finance). In terms of greatest number of vacancies, Police Officer (42), Public Works Maintenance Worker (24) Firefighter/Paramedic (31) and Assistant Engineer II (19) have the highest number.

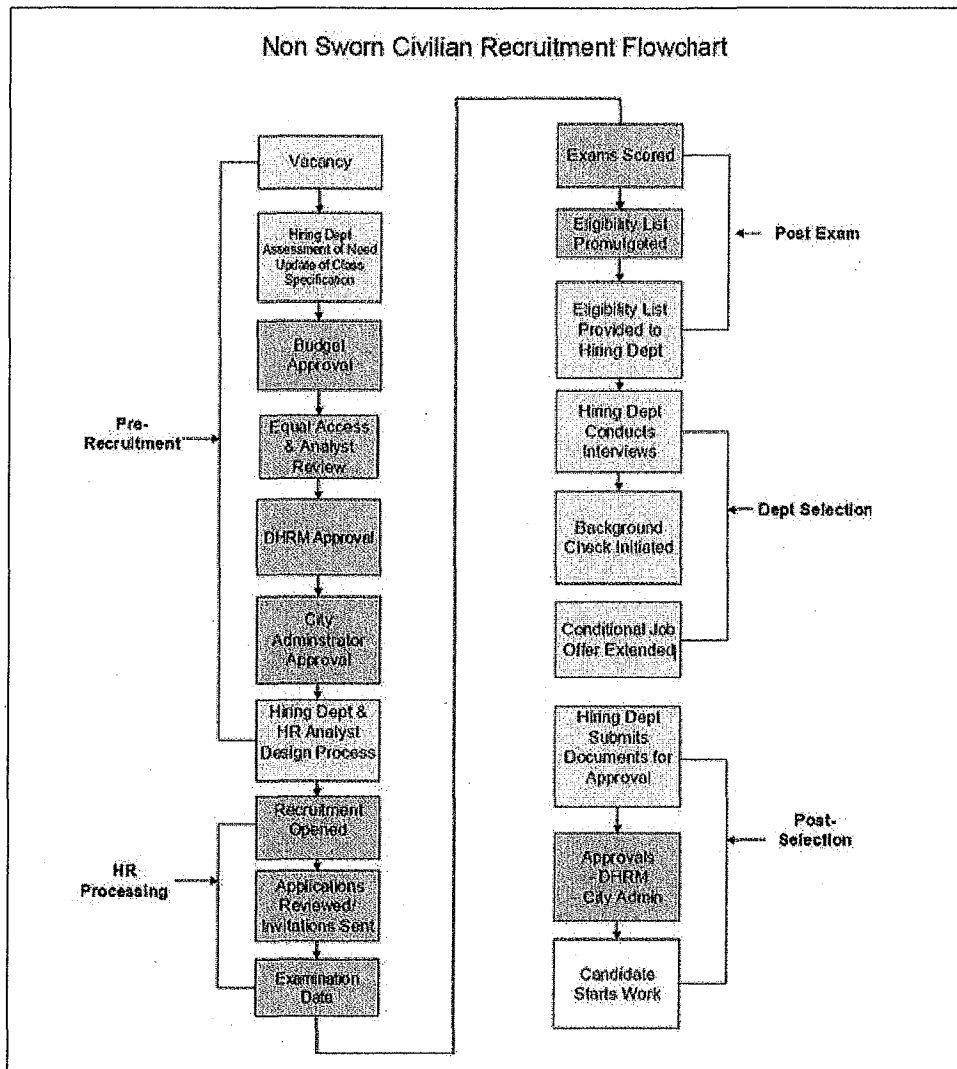
City of Oakland Recruitment Process

There are several key documents that govern the civil service recruitment process. First, the City of Oakland Charter, Article IX (Section 900) – Personnel Policy, requires a comprehensive personnel system based on merit. Second, the Personnel Manual of the Civil Service Board details the rules that govern the competitive civil service. Third, the labor agreements between the City and labor groups may address recruitment, selection and promotional processes. There are also Federal and State laws, City administrative policies, uniform recruitment guidelines and best practices that impact the recruitment process.

The amount of time a recruitment takes varies depending on the type of job and the complexity of the testing needed to identify the most qualified candidate(s). **Figure A** shows the typical recruiting process for non-sworn positions. HRM has been working to reduce the amount of recruitment time, while staying compliant with applicable labor agreements and the Civil Service Rules.

Figure A shows the flowchart of the recruitment process from the identification of a vacancy to when it is filled. The below flowchart is a framework. Due to the complexity of recruitments, there can be multiple actions for any one stage.

Figure A: Non-Sworn Recruitment Process



Recruitment Strategies

HRM works closely with the City Administrator's Office and Department Heads to develop short- and long-term strategies for filling vacancies, including enhancing cross-departmental communication, identifying recruitment priorities, better outreach and education and collaborating on efficiencies. Below are recent strategies that have short- and long-term positive impacts to the recruitment process.

1. HRM and Department Coordination: HRM is partnering with departments, in close coordination with City Administration, to better set priorities based on service needs. Departments are assuming more responsibilities, including recruitment planning, job analyses and assessor identification. This allows for portions of the planning process to be completed before an HR Analyst is assigned the recruitment. HRM expects this strategy to reduce the hiring timeline by 1-3 weeks, depending on the recruitment.
2. Additional HR Staff: Adding HRM staff to recruitment and training efforts will be the primary long-term recruitment and retention solution. As part of the mid-cycle budget, a supervising analyst and two lead analysts were added to the recruitment unit. HRM is in the recruitment planning and interview process for these positions and anticipates filling them within 120-140 days. However, there is a high demand for qualified public-sector human resources talent and market conditions are unpredictable. If full staffing is achieved, it is anticipated that HRM can increase its recruitment capacity by 30-40 additional recruitments once the new employees are proficient. In the meantime, a part-time annuitant was hired in October to add recruitment capacity.
3. Recruitment Consultant: With Council's approval, a three-year contract was signed with Cooperative Personnel Service (CPS) to provide on-call recruitment services for departments. HRM will oversee the services, which will enable departments to expedite priorities. CPS will manage approximately 5-7 low-volume, specialized civil service recruitments and are currently working with Public Works and HRM recruitments. HRM expects the first recruitments to be complete in late December and positions filled by early February 2019.
4. Retention Efforts: It is anticipated that the City of Oakland will experience attrition rates that will keep pace with hiring efforts. By expanding organizational development resources, the City must continue to retain and grow its current workforce. During the mid-cycle budget, Council approved the addition of a support staff position to city-wide training efforts, providing increased capacity for retention efforts.
5. Exempt recruitments to Departments: HRM is transitioning two civil service exempt recruitments to departments. For over 10 years, HRM has conducted summer hiring for the Oakland Parks, Recreation, and Youth Development (OPRYD) Department, dedicating approximately 400 staff hours annually to the effort. HRM is transitioning these recruitments to OPRYD. HRM has also transitioning many aspects of the Police Officer Trainee recruitment to the Oakland Police Department (OPD), which will increase outreach efforts and save HRM resources. HRM expects this strategy to increase the recruitment capacity by 10-15 recruitments once the transition is completed by Spring 2019.

6. Continuous recruitments: For some difficult to fill positions, or positions with ongoing vacancies, HRM has opened continuous recruitments on the online application platform. This effort is increasing the supply of applicants for testing and potential appointment. Examples of classifications opened continuously include Police Communication Dispatcher, Head Start Instructor, Police Cadet, and various positions in the City Attorney's Office. Currently, there are only four Police Communication Dispatcher vacancies, which is a historic low.
7. Union Partnership: One reason for the low Police Communications Dispatcher rate is the Service Employees International Union, Local 1021 agreed that all candidates who passed the examination can be certified to OPD. There has been improved communication and coordination on class specification updates with labor groups, saving time on recruitments. The City and labor groups are exploring other ways to efficiently fill vacancies.
8. SWAP Program: By addressing the Risk Management issues, HRM partnered with OPW in reviving the Sherriff's Office Work Alternative Program (SWAP). It is anticipated that this program will contribute over 20,000 hours annually of services through relatively low-risk work activities such as raking, weeding, and collecting debris.
9. Improved Marketing: While the ability to fill vacancies can be challenging, it is vital that the City use social media and the updated website to spread information about job postings and to showcase the City of Oakland as an employer of choice. HRM and the City Administrator's Office are expanding the use of on-line platforms such as LinkedIn, Nextdoor, and Facebook to search for highly qualified employees. The HRM recruitment video, developed last year, won third place in a national competition. HRM understands the need to expedite hiring to keep potential candidates interested and available. Additionally, HRM and Departments are improving "candidate care" by increasing communication and customer service to potential employees.
10. Community Partnerships: HRM has been increasing outreach to potential applicants and educational opportunities for current city employees through community partnerships. HRM Staff meets regularly with members of Peralta Community College District's Workforce Development Unit to partner in helping develop our existing workforce and to outreach potential applicants. Additionally, HRM will be participating in a public-sector job fair in early-2019 hosted by Peralta.
11. Other Efforts: HRM, in partnership with the City Administrator's Office, is carefully dissecting the recruiting process and is evaluating minimum qualifications for positions that have yielded a low number of qualified applicants, reducing testing hurdles for some recruitments and improving "candidate care" for all that express interest in working for the City of Oakland.

Recruitment Challenges

There are several challenges that will continue to inhibit the progress the City of Oakland makes on reducing the number of vacancies.

1. Balancing Compliance and Efficiencies: The Charter, Civil Service Rules and Labor Agreements are the pillars of the competitive civil service. HRM will continue to comply with governing laws, rules and agreements. Where there is an opportunity to reform and agree, HRM will continually seek efficiencies in a transparent manner.
2. Cascade Effect: Many vacant positions are filled by current employees who promote or transfer from other positions. This is a critical aspect of succession planning. From January 1 to September 1, 2018, 261 full-time employees were hired. Of these, 129 (49%) were hired from other full-time positions, resulting in another vacancy. The cascade effect makes it difficult to address the overall vacancy rate.
3. Attrition and Separations: Another challenge the city faces with filling positions is keeping up with the rate of attrition. As demonstrated in **Figure B**, over the last five years, the number of hires does not keep pace with the number of separation.

Figure B: Separations and Hires by Fiscal Year

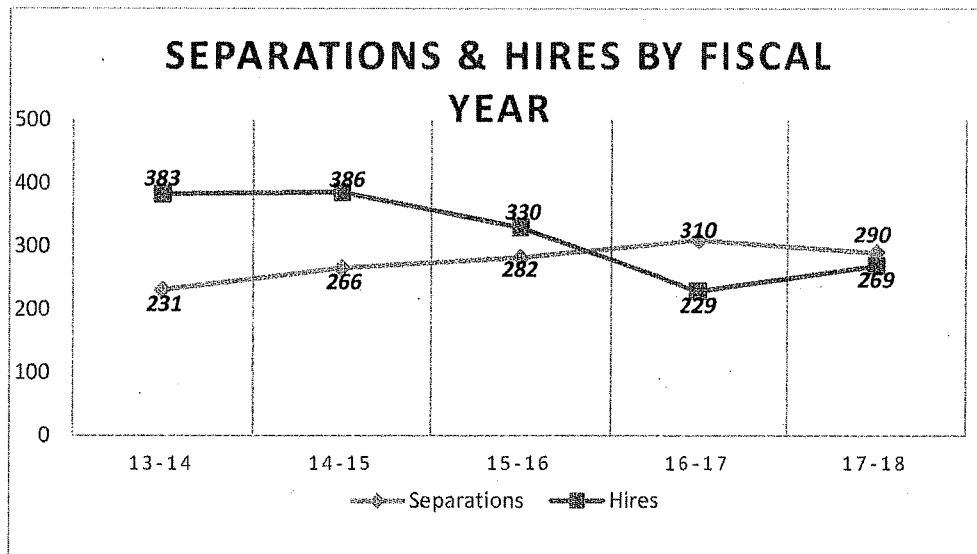
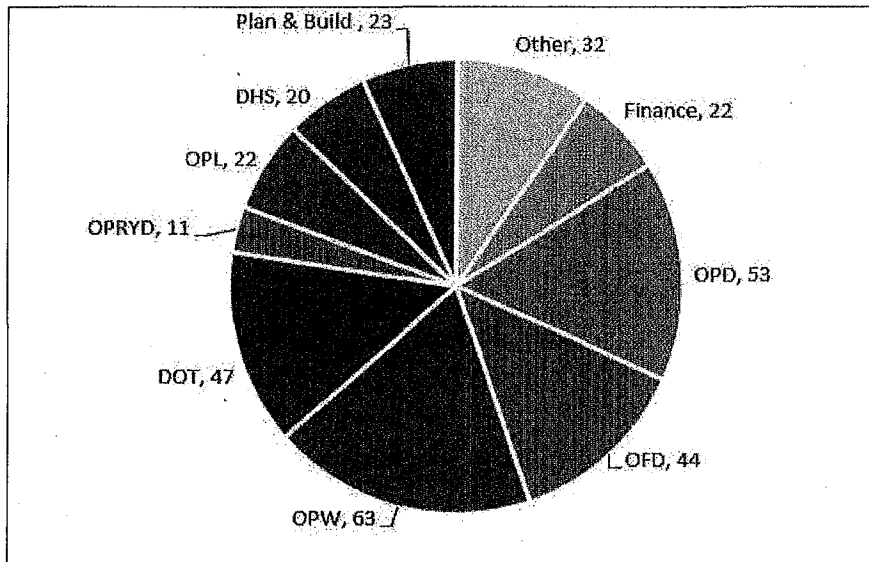


Table 7 provides for additional information on reasons for separation. The number of retirements and resignations is nearly equal for the last five years.

FY	Total	Retirement	Resignation	Other
13-14	231	100	98	33
		43%	42%	14%
14-15	266	108	115	43
		41%	43%	16%
15-16	282	113	132	37
		40%	47%	13%
16-17	310	131	140	39
		42%	45%	13%
17-18	290	117	139	34
		40%	48%	12%

4. **Succession Planning:** HRM is encouraging departments to begin planning for impending staff retirements and to continue efforts for succession planning. As demonstrated in **Figure C**, 339 full-time employees have at least 23-years of service and are age 50 or older. If not properly planned for, the retirement of these individuals will result in loss of institutional knowledge and will negatively impact services and the vacancy rate.

Figure C – Potential Retirement Eligible Employees



FISCAL IMPACT

This item is for informational purposes only and does not have a direct fiscal impact or cost. All positions reflected in this report are budgeted positions.

PUBLIC OUTREACH / INTEREST

No outreach was necessary for this report beyond the standard City Council agenda noticing procedures.

COORDINATION

Human Resources Management Department staff coordinated the collection and verification of data provided in this report with staff in each of the City's departments, the Finance Department's Budget Bureau, and the Office of the City Attorney.

SUSTAINABLE OPPORTUNITIES

Economic: There are no economic impacts associated with this informational report.

Environmental: There are no environmental impacts associated with this informational report.

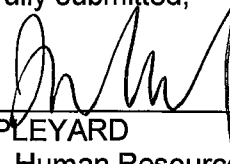
Social Equity: There are no social equity impacts associated with this informational report.

ACTION REQUESTED OF THE CITY COUNCIL

Staff recommends acceptance of this semi-annual informational report on budgeted vacant positions through September 24, 2018.

For questions regarding this report, please contact Greg Preece, Human Resource Manager, at (510) 238-3112.

Respectfully submitted,



IAN APPLEYARD
Director, Human Resources Management

Reviewed by:
Greg Preece, Human Resources Manager

Attachments and Data Prepared by:
Lisa Wright, HR Operations Supervisor

Attachment:

- A – Citywide Vacancies by Department*
- B – New Vacancies Created in Midcycle Adopted Policy Budget FY 2018-19*
- C – Vacancies in Oakland Public Works and the Department of Transportation*
- D – Talent 2.0 - A Modern Approach to Attracting & Retaining Top Talent in Local Government*

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
COUNCIL	City Councilmember's Assistant	0.44	On Hold (by Dept)
COUNCIL Total		0.44	
MAYOR	Special Assistant to the Mayor I	1.00	Encumbered
MAYOR Total		1.00	
CAO	Admin Asst to City Administrator	1.00	On Hold (by Dept)
CAO	Animal Care Attendant	1.00	Depart Interview Process
CAO	Animal Control Officer	3.00	Job Offer Extended
CAO	Animal Control Officer, PPT	0.50	Depart Interview Process
CAO	Animal Control Supervisor	1.00	Encumbered (linked to PT class)
CAO	Assistant City Administrator	1.00	On Hold (by Dept)
CAO	City Administrator Analyst	1.00	On Hold (by Dept)
CAO	Public Information Officer II	1.00	On Hold (by Dept)
CAO	Receptionist, PPT	0.60	Encumbered (linked to PT class)
CAO	Veterinarian	1.00	Encumbered (linked to PT class)
CAO	Veterinary Technician	2.00	Depart Interview Process
CAO Total		13.10	
OCA	Deputy City Attorney II	1.00	Recruitment Open (application intake)
OCA	Deputy City Attorney IV	1.00	Recruitment Open (application intake)
OCA	Deputy City Attorney V	1.00	Recruitment Open (application intake)
OCA	Legal Administrative Assistant	1.00	Depart Interview Process
OCA Total		4.00	
HRM	Administrative Assistant II (CONF)	1.00	Encumbered (temp agency)
HRM	Human Resource Analyst (CONF)	1.00	Recruitment Plan in Progress
HRM	Human Resource Analyst, Principal	1.00	Recruitment Plan in Progress
HRM	Human Resource Analyst, Senior	3.00	Recruitment Plan in Progress
HRM	Human Resource Technician, Senior	1.00	Eligible List Available
HRM	Program Analyst I	1.00	Encumbered (temp agency)
HRM Total		8.00	
AUDITOR	Performance Audit Manager	1.00	Job Offer Extended
AUDITOR Total		1.00	
FINANCE	Account Clerk II	2.00	Approved (pending HR assignment)
FINANCE	Accountant III	1.00	Requisition Pending Approval
FINANCE	Accounting Supervisor	1.00	Requisition Pending Approval
FINANCE	Accounting Technician	1.00	Requisition Pending Approval
FINANCE	Budget & Management Analyst	1.00	Requisition Pending Approval
FINANCE	Budget & Mgmt Analyst, Asst.	1.00	Recruitment Closed (screening apps)
FINANCE	Budget Administrator, Assistant	1.00	Encumbered (underfilled)
FINANCE	Business Analyst II	1.00	Approved (pending HR assignment)
FINANCE	Manager, Finance	1.00	Requisition Pending Approval
FINANCE	Program Analyst II	1.00	Approved (pending HR assignment)
FINANCE	Public Service Rep, Sr	1.00	Encumbered (acting)
FINANCE	Public Service Representative	5.00	Approved (pending HR assignment)
FINANCE	Revenue & Tax Admin, Asst	1.00	Job Offer Extended
FINANCE	Revenue Assistant	3.00	Recruitment Closed (screening apps)
FINANCE	Tax Enforcement Officer II	1.00	Recruitment Closed (screening apps)
FINANCE Total		22.00	
POLICE	Account Clerk II	1.00	Job Offer Extended
POLICE	Accountant II	1.00	Recruitment Plan in Progress
POLICE	Administrative Analyst II	1.00	Depart Interview Process
POLICE	Administrative Assistant I	1.00	Job Offer Extended
POLICE	Business Analyst III	1.00	Recruitment Plan in Progress
POLICE	Crime Analyst	2.00	Depart Interview Process
POLICE	Criminalist I	1.00	Inactive (no immediate plans to fill)
POLICE	Criminalist II	1.00	Requisition Pending Approval
POLICE	Criminalist III	1.00	HR Assessment & Scoring

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
POLICE	Crossing Guard, PPT	1.00	On Hold (by Dept)
POLICE	Deputy Chief of Police (PERS)	1.00	Encumbered
POLICE	Intake Technician	1.00	Approved (pending HR assignment)
POLICE	Latent Print Examiner II	1.00	Approved (pending HR assignment)
POLICE	Lieutenant of Police (PERS)	1.00	Depart Interview Process
POLICE	Management Assistant	4.00	On Hold (Job spec revisions or FEHA)
POLICE	Office Assistant I	1.00	On Hold (Job spec revisions or FEHA)
POLICE	Police Communications Dispatcher	4.00	Depart Interview Process
POLICE	Police Communications Operator	7.00	Inactive (no immediate plans to fill)
POLICE	Police Officer (PERS)	42.00	Recruitment Open (application intake)
POLICE	Police Officer Trainee	85.00	Encumbered (Continuous Academies)
POLICE	Police Personnel Oper Specialist	10.00	Requisition Pending Approval
POLICE	Police Records Specialist	1.00	Eligible List Referred to Dept
POLICE	Police Services Technician II	10.00	Approved (pending HR assignment)
POLICE	Project Manager III	1.00	Approved (pending HR assignment)
POLICE	Sergeant of Police (PERS)	9.00	Eligible List Available
POLICE	Student Trainee, PT	0.50	Depart Interview Process
POLICE Total		189.50	
FIRE	Assistant Chief of Fire Department	1.00	Encumbered (underfilled)
FIRE	Battalion Chief	2.00	Depart Interview Process
FIRE	Captain of Fire Department	12.00	Encumbered (linked)
FIRE	Emergency Planning Coordinator, Sr	2.00	Depart Interview Process
FIRE	Engineer of Fire Department	10.00	Recruitment Plan in Progress
FIRE	Fire Communications Dispatcher	1.00	Job Offer Extended
FIRE	Fire Communications Supervisor	1.00	Encumbered (linked to TCSE)
FIRE	Fire Fighter	21.00	Depart Interview Process/FF Trainee
FIRE	Fire Fighter Paramedic	10.00	Depart Interview Process/FF Trainee
FIRE	Fire Investigator	1.00	Recruitment Plan in Progress
FIRE	Fire Marshal (Non-Sworn)	1.00	Encumbered (linked to TCSE)
FIRE	Fire Marshall, Assistant	1.00	Encumbered (acting)
FIRE	Fire Prevent Bureau Inspect, Civil	7.00	Eligible List Referred to Dept
FIRE	Fire Protection Engineer	1.00	Depart Interview Process
FIRE	Fire Suppression Dist Inspect PT	1.00	Depart Interview Process
FIRE	Lieutenant of Fire Department	9.00	Encumbered (OT for minimum staffing)
FIRE	Management Intern, PT	1.75	Depart Interview Process
FIRE	Office Assistant I, PPT	0.60	Depart Interview Process
FIRE	Temp Contract Svcs Employee, PT	0.20	On Hold (by Dept)
FIRE	US&R Wrhs & Logistics Spec	1.00	On Hold (by Dept)
FIRE	Vegetation Management Supervisor	1.00	On Hold (Job spec revisions or FEHA)
FIRE Total		85.55	
OPW	Accountant I	1.00	Requisition Pending Approval
OPW	Administrative Analyst II	1.00	Eligible List Referred to Dept
OPW	Administrative Assistant II	1.00	Recruitment Plan in Progress
OPW	Administrative Services Manager II	1.00	Encumbered
OPW	Assist Director, Pub Works Agency	1.00	Encumbered
OPW	Assistant to the Director	1.00	Hire Authorization in Progress
OPW	Auto Equipment Mechanic	3.00	Requisition Pending Approval
OPW	Business Analyst III	1.00	Recruitment Plan in Progress
OPW	Capital Improvement Project Coor	3.00	Recruitment Plan in Progress
OPW	Clean Community Supervisor	1.00	Requisition Pending Approval
OPW	Construction & Maintenance Mechanic	1.00	Recruitment Plan in Progress
OPW	Construction & Maintenance Supv I	3.00	Depart Interview Process
OPW	Construction Inspector (Field)	3.00	Recruitment Plan in Progress
OPW	Construction Inspector Sup (Field)	1.00	Requisition Pending Approval
OPW	Construction Inspector, Sr (Field)	1.00	Depart Interview Process

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
OPW	Custodial Services Supervisor I	1.00	Depart Interview Process
OPW	Custodian	6.00	Recruitment Plan in Progress
OPW	Custodian, PPT	1.00	Recruitment Plan in Progress
OPW	Electrical Engineer II	1.00	Recruitment Plan in Progress
OPW	Electrical Painter	3.00	Recruitment Plan in Progress
OPW	Engineer, Assistant II (Office)	3.00	Recruitment Plan in Progress
OPW	Engineer, Civil (Field)	1.00	Encumbered
OPW	Engineer, Civil (Office)	1.00	Depart Interview Process
OPW	Engineer, Transportation Assistant	1.00	Encumbered
OPW	Engineering Intern, PT	1.00	Recruitment Plan in Progress
OPW	Environmental Program Specialist	1.00	Recruitment Plan in Progress
OPW	Facilities Complex Mgr, Asst	1.00	Requisition Pending Approval
OPW	Fleet Specialist	1.00	Encumbered
OPW	Gardener Crew Leader	1.00	Recruitment Plan in Progress
OPW	Gardener II	1.00	Depart Interview Process
OPW	Heavy Equipment Mechanic	3.00	Requisition Pending Approval
OPW	Heavy Equipment Operator	3.00	Recruitment Plan in Progress
OPW	Heavy Equipment Service Worker	1.00	Requisition Pending Approval
OPW	Heavy Equipment Supervisor	1.00	Encumbered
OPW	Litter/Nuisance Enforcement Officer	4.00	HR Assessment & Scoring
OPW	Maintenance Mechanic	3.00	Requisition Pending Approval
OPW	Management Assistant	1.00	Encumbered
OPW	Manager, Capital Improvement Pgrm	1.00	Requisition Pending Approval
OPW	Manager, Environmental Services	1.00	Requisition Pending Approval
OPW	Manager, Equipment Services	1.00	Requisition Pending Approval
OPW	Office Assistant II	1.00	Recruitment Plan in Progress
OPW	Painter	3.00	Requisition Pending Approval
OPW	Park Attendant, PPT	1.00	Depart Interview Process
OPW	Park Attendant, PT	3.52	Requisition Pending Approval
OPW	Park Equipment Operator	1.00	On Hold (Job spec revisions or FEHA)
OPW	Park Supervisor I	2.00	On Hold (Job spec revisions or FEHA)
OPW	Program Analyst II	1.00	Requisition Pending Approval
OPW	Program Analyst III	1.00	Approved (pending HR assignment)
OPW	Project Manager	2.00	Recruitment Plan in Progress
OPW	Public Service Rep, Sr	1.00	Depart Interview Process
OPW	Public Works Maintenance Worker	13.00	Depart Interview Process
OPW	Public Works Supervisor I	3.00	Recruitment Closed (screening apps)
OPW	Public Works Supervisor II	1.00	Recruitment Closed (screening apps)
OPW	Sewer Maintenance Leader	1.00	Depart Interview Process
OPW	Sewer Maintenance Worker	2.00	Recruitment Plan in Progress
OPW	Stationary Engineer	2.00	Requisition Pending Approval
OPW	Student Trainee, PT	2.00	Recruitment Plan in Progress
OPW	Support Services Supervisor	1.00	Encumbered
OPW	Tree Supervisor I	1.00	Depart Interview Process
OPW	Tree Trimmer	3.00	Recruitment Plan in Progress
OPW Total		111.52	
DOT	Accountant I	1.00	Requisition Pending Approval
DOT	Arboricultural Inspector	1.00	Requisition Pending Approval
DOT	Assistant to the Director	1.00	Depart Interview Process
DOT	Business Analyst II	1.00	Requisition Pending Approval
DOT	Construction Inspector (Field)	3.00	Requisition Pending Approval
DOT	Drafting/Design Technician, Sr	1.00	Encumbered (linked to TCSE)
DOT	Electrical Const & Maint Planner	1.00	Requisition Pending Approval
DOT	Electrical Engineer III	1.00	Requisition Pending Approval
DOT	Engineer, Assistant II (Office)	14.00	Requisition Pending Approval

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
DOT	Engineer, Civil (Office)	2.00	Requisition Pending Approval
DOT	Engineer, Civil Principal	1.00	Requisition Pending Approval
DOT	Engineer, Transportation	4.00	Requisition Pending Approval
DOT	Engineer, Transportation Assistant	1.00	Encumbered (underfilled)
DOT	Engineer, Transportation Supv	1.00	Eligible List Referred to Dept
DOT	Engineering Technician II (Office)	1.00	Eligible List Referred to Dept
DOT	Heavy Equipment Operator	3.00	Requisition Pending Approval
DOT	Office Assistant II	1.00	On Hold (by Dept)
DOT	Parking Control Technician, PPT	5.25	Requisition Pending Approval
DOT	Program Analyst I	1.00	On Hold (by Dept)
DOT	Program Analyst II	5.00	Eligible List Referred to Dept
DOT	Program Analyst III	2.00	On Hold (by Dept)
DOT	Project Manager	1.00	HR Assessment & Scoring
DOT	Project Manager II	1.00	Depart Interview Process
DOT	Public Works Maintenance Worker	11.00	Recruitment Plan in Progress
DOT	Public Works Supervisor I	1.00	HR Assessment & Scoring
DOT	Public Works Supervisor II	2.00	HR Assessment & Scoring
DOT	Sign Maintenance Worker	2.00	Requisition Pending Approval
DOT	Spatial Database Analyst III	1.00	Requisition Pending Approval
DOT	Student Trainee, PT	1.00	Encumbered (linked to PT class)
DOT	Surveying Technician, Sr (Field)	1.00	Requisition Pending Approval
DOT	Traffic Sign Maker	1.00	On Hold (Job spec revisions or FEHA)
DOT	Transportation Planner, Senior	1.00	Requisition Pending Approval
DOT Total		74.25	
ITD	Business Analyst III	1.00	Recruitment Plan in Progress
ITD	Business Analyst IV	1.00	Encumbered (linked to TCSE)
ITD	Exec Asst to the Director	1.00	Hire Authorization in Progress
ITD	Information Systems Manager I	1.00	Depart Interview Process
ITD	Information Systems Manager II	1.00	Job Offer Extended
ITD	Information Systems Spec II	2.00	Requisition Pending Approval
ITD	Project Manager II	2.00	On Hold (by Dept)
ITD	Reprographic Shop Supervisor	1.00	Recruitment Open (application intake)
ITD Total		10.00	
OPR	Facility Security Assistant	1.98	Recruitment Plan in Progress
OPR	Facility Security Assistant, PPT	0.75	Recruitment Plan in Progress
OPR	Naturalist, Supervising	1.00	Inactive (no immediate plans to fill)
OPR	Office Assistant II	1.00	Recruitment Plan in Progress
OPR	Program Analyst II	1.00	Inactive (no immediate plans to fill)
OPR	Public Service Representative	1.00	On Hold (Job spec revisions or FEHA)
OPR	Recreation Center Director	1.00	Recruitment Closed (screening apps)
OPR	Recreation General Supervisor	1.00	Recruitment Closed (screening apps)
OPR	Recreation Leader II, PPT	7.50	Recruitment Plan in Progress
OPR	Recreation Program Director	6.00	Recruitment Plan in Progress
OPR	Recreation Specialist I, PPT	0.48	Inactive (no immediate plans to fill)
OPR	Recreation Specialist II, PPT	3.95	Inactive (no immediate plans to fill)
OPR	Recreation Supervisor	2.00	Recruitment Plan in Progress
OPR	Temp Contract Svcs Employee, PT	1.00	Inactive (no immediate plans to fill)
OPR	Van Driver, PPT	0.75	Recruitment Plan in Progress
OPR Total		30.41	
LIBRARY	Account Clerk III	1.00	On Hold (by Dept)
LIBRARY	Administrative Analyst I	1.00	Depart Interview Process
LIBRARY	Associate Director, Library Services	1.00	Encumbered (acting)
LIBRARY	Curator AAMLO, Chief	1.00	Encumbered (linked to ELDE)
LIBRARY	Director of Library Services	1.00	Encumbered (Interim)
LIBRARY	Librarian I	8.00	On Hold (by Dept)

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
LIBRARY	Librarian I, PPT	4.24	On Hold (by Dept)
LIBRARY	Librarian II	4.00	On Hold (by Dept)
LIBRARY	Librarian, Senior	1.00	On Hold (by Dept)
LIBRARY	Librarian, Supervising	1.00	Inactive (no immediate plans to fill)
LIBRARY	Library Aide	17.00	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	12.00	Recruitment Plan in Progress
LIBRARY	Library Assistant	8.00	On Hold (by Dept)
LIBRARY	Library Assistant, Senior	1.00	On Hold (by Dept)
LIBRARY	Library Assistant, Senior, PPT	2.40	On Hold (by Dept)
LIBRARY	Library Asst, PPT	10.50	On Hold (by Dept)
LIBRARY	Library Automation Supervisor	1.00	Encumbered
LIBRARY	Literacy Assistant	1.00	Encumbered (linked to PT class)
LIBRARY	Museum Guard	1.00	Encumbered (linked to PT class)
LIBRARY	Program Analyst I, PT	0.20	Inactive (no immediate plans to fill)
LIBRARY	Program Analyst III	1.00	On Hold (by Dept)
LIBRARY	Student Trainee, PT	0.60	Inactive (no immediate plans to fill)
LIBRARY Total		78.94	
RACE & EQUITY	Administrative Assistant II	1.00	Depart Interview Process
RACE & EQUITY Total		1.00	
POLICE COMM	Administrative Analyst II	1.00	Depart Interview Process
POLICE COMM	Complaint Investigator II	1.00	Inactive (no immediate plans to fill)
POLICE COMM	Complaint Investigator III	1.00	Job Offer Extended
POLICE COMM Total		3.00	
VIOLENCE PA	Administrative Analyst II	1.00	On Hold (by Dept)
VIOLENCE PA	Deputy Dir, Public Ethics Comm	1.00	On Hold (by Dept)
VIOLENCE PA	Director of Human Services	1.00	Encumbered (Interim)
VIOLENCE PA Total		3.00	
HSD	Accountant III	1.00	Requisition Pending Approval
HSD	Administrative Assistant I	1.00	Requisition Pending Approval
HSD	Administrative Assistant II	1.00	Eligible List Referred to Dept
HSD	Assistant to the Director	1.00	Requisition Pending Approval
HSD	Case Manager II	3.00	On Hold (Job spec revisions or FEHA)
HSD	Case Manager, Supervising	1.00	Job Offer Extended
HSD	Cook III	1.00	Eligible List Available
HSD	Early Childhood Center Director	1.00	Recruitment Open (application intake)
HSD	Early Head Start Instructor	3.00	Recruitment Open (application intake)
HSD	Food Service Worker, PT	1.00	Recruitment Open (application intake)
HSD	Head Start Instructor	1.00	Recruitment Open (application intake)
HSD	Headstart Program Coordinator	1.00	Encumbered
HSD	Health & Human Svcs Prgm Planner	1.00	Encumbered
HSD	Manager, Human Services	1.00	Encumbered
HSD	Office Assistant I, PPT	0.60	Encumbered
HSD	Office Assistant I, PT	1.06	Encumbered
HSD	Outreach Developer	1.00	Encumbered
HSD	Program Analyst I	3.00	Depart Interview Process
HSD	Program Analyst II	3.00	Requisition Pending Approval
HSD	Recreation Attendant I, PT	10.50	Recruitment Plan in Progress
HSD	Senior Center Director	2.00	Recruitment Open (application intake)
HSD Total		39.16	
PBD	Administrative Services Manager I	1.00	Depart Interview Process
PBD	Assist Director, Pub Works Agency	1.00	On Hold (Job spec revisions or FEHA)
PBD	Deputy Director/Building Official	1.00	Encumbered (Executive Recruitment)
PBD	Deputy Director/City Planner	1.00	Encumbered (Executive Recruitment)
PBD	Engineer, Assistant II (Office)	2.00	Encumbered (underfilled)
PBD	Engineer, Civil Supv (Office)	1.00	Eligible List Referred to Dept

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
PBD	Inspection Services Manager	1.00	Requisition Pending Approval
PBD	Management Assistant	1.00	Approved (pending HR assignment)
PBD	Manager, Zoning	1.00	HR Assessment & Scoring
PBD	Office Assistant II	1.00	Depart Interview Process
PBD	Permit Technician II	2.00	Approved (pending HR assignment)
PBD	Planner I	1.00	Job Offer Extended
PBD	Planner II	2.00	Job Offer Extended
PBD	Planner III	1.00	On Hold (by Dept)
PBD	Planner III, Historic Preservation	1.00	Approved (pending HR assignment)
PBD	Planner IV	1.00	Depart Interview Process
PBD	Planner V	1.00	Encumbered (Interim)
PBD	Planning Investigator	1.00	Encumbered
PBD	Principal Inspection Supv	1.00	Requisition Pending Approval
PBD	Process Coordinator II	3.00	Recruitment Plan in Progress
PBD	Process Coordinator III	2.00	Recruitment Plan in Progress
PBD	Program Analyst III	1.00	Requisition Pending Approval
PBD	Public Service Representative	2.00	Depart Interview Process
PBD	Specialty Combination Inspector	11.00	Depart Interview Process
PBD Total		41.00	
EWD	Accountant II	1.00	Encumbered (linked to ELDE)
EWD	Graphic Design Specialist	1.00	On Hold (by Dept)
EWD	Program Analyst I	1.00	Depart Interview Process
EWD	Real Estate Agent	1.00	Recruitment Plan in Progress
EWD	Real Estate Services Manager	1.00	Encumbered
EWD	Student Trainee, PT	1.00	Inactive (no immediate plans to fill)
EWD	Urban Economic Analyst II	1.00	On Hold (by Dept)
EWD	Urban Economic Coordinator	1.00	Inactive (no immediate plans to fill)
EWD Total		8.00	
HCD	Accountant I	1.00	Recruitment Plan in Progress
HCD	Administrative Assistant I	1.00	Depart Interview Process
HCD	Business Analyst III	1.00	Approved (pending HR assignment)
HCD	Community Dev Prgm Coordinator	1.00	Recruitment Plan in Progress
HCD	Development/Redevelopment Pgrm MGR	1.00	On Hold (Job spec revisions or FEHA)
HCD	Hearing Officer	3.00	Recruitment Plan in Progress
HCD	Home Management Specialist III	1.00	On Hold (Job spec revisions or FEHA)
HCD	Housing Development Coordinator III	1.00	Recruitment Plan in Progress
HCD	Housing Development Coordinator IV	1.00	Encumbered (provisional)
HCD	Loan Servicing Administrator	1.00	Encumbered (acting)
HCD	Program Analyst I	2.00	Requisition Pending Approval
HCD	Program Analyst III	2.00	Recruitment Plan in Progress
HCD	Rehabilitation Advisor III	1.00	Recruitment Open (application intake)
HCD	Student Trainee, PT	0.50	Inactive (no immediate plans to fill)
HCD Total		17.50	

Grand Total

742.37

DEPT	JOB CLASSIFICATION TITLE	FTE	PPC#	STATUS OF VACANCY/REQ
CAO	Receptionist, PPT	0.60	41465	Encumbered (linked to PT class)
CAO	Public Service Representative	1.00	41466	Filled
CAO	Animal Care Attendant	1.00	41467	Filled
CAO Total		2.60		
OCA	Deputy City Attorney II	1.00	41468	Recruitment Open (application intake)
OCA Total		1.00		
HRM	Human Resource Analyst, Principal	1.00	41332	Recruitment Plan in Progress
HRM	Human Resource Analyst, Senior	1.00	41333	Recruitment Plan in Progress
HRM	Human Resource Analyst, Senior	1.00	41334	Recruitment Plan in Progress
HRM	Administrative Assistant II (CONF)	1.00	41469	Encumbered (temp agency)
HRM Total		4.00		
FINANCE	Account Clerk II	1.00	41471	Approved (pending HR assignment)
FINANCE	Account Clerk II	1.00	41472	Approved (pending HR assignment)
FINANCE	Tax Auditor II	1.00	41470	Filled
FINANCE Total		3.00		
POLICE	Crime Analyst	1.00	41473	Depart Interview Process
POLICE	Police Officer Trainee	35.00	41474	Encumbered (Continuous Academies)
POLICE	Crossing Guard, PT	6.00	41475	Encumbered (PT staff)
POLICE Total		42.00		
FIRE	Vegetation Management Supervisor	1.00	41476	On Hold (Job spec revisions or FEHA)
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41477	Eligible List Referred to Dept
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41478	Eligible List Referred to Dept
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41479	Eligible List Referred to Dept
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41480	Eligible List Referred to Dept
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41481	Eligible List Referred to Dept
FIRE	Fire Prevent Bureau Inspect, Civil	1.00	41482	Eligible List Referred to Dept
FIRE	Budget & Grants Administrator	1.00	41483	Filled
FIRE Total		8.00		
OPW	Management Assistant	1.00	41335	Encumbered
OPW	Public Service Rep, Sr	1.00	41336	Depart Interview Process
OPW	Capital Improvement Project Coor	1.00	41337	Requisition Pending Approval
OPW	Project Manager	1.00	41339	Recruitment Plan in Progress
OPW	Construction Inspector (Field)	1.00	41340	Recruitment Plan in Progress
OPW	Student Trainee, PT	2.00	41341	Recruitment Plan in Progress
OPW	Litter/Nuisance Enforcement Officer	1.00	41342	HR Assessment & Scoring
OPW	Litter/Nuisance Enforcement Officer	1.00	41343	HR Assessment & Scoring
OPW	Litter/Nuisance Enforcement Officer	1.00	41344	HR Assessment & Scoring
OPW	Public Works Maintenance Worker	1.00	41346	Approved (pending HR assignment)
OPW	Public Works Maintenance Worker	1.00	41347	Approved (pending HR assignment)
OPW	Litter/Nuisance Enforcement Officer	1.00	41349	HR Assessment & Scoring
OPW	Public Works Maintenance Worker	1.00	41350	Approved (pending HR assignment)
OPW	Clean Community Supervisor	1.00	41351	Requisition Pending Approval
OPW	Public Works Maintenance Worker	1.00	41352	Approved (pending HR assignment)
OPW	Public Works Maintenance Worker	1.00	41353	Approved (pending HR assignment)
OPW	Capital Improvement Project Coor	1.00	41338	Filled
OPW	Street Maintenance Leader	1.00	41345	Filled
OPW	Street Maintenance Leader	1.00	4134	Filled
OPW Total		20.00		
DOT	Assistant to the Director	1.00	41354	Depart Interview Process
DOT	Spatial Database Analyst III	1.00	41355	Requisition Pending Approval
DOT	Engineer, Assistant II (Office)	1.00	41356	Requisition Pending Approval
DOT	Student Trainee, PT	0.50	41357	Encumbered (linked to PT class)

DEPT	JOB CLASSIFICATION TITLE	FTE	PPC#	STATUS OF VACANCY/REQ
DOT	Program Analyst II	1.00	41358	Requisition Pending Approval
DOT	Public Works Supervisor I	1.00	41359	Filled
DOT	Student Trainee, PT	0.50	41360	Encumbered (linked to PT class)
DOT Total		6.00		
ITD	Business Analyst IV	1.00	41361	Encumbered (linked to TCSE)
ITD	Project Manager II	1.00	41362	On Hold (by Dept)
ITD Total		2.00		
LIBRARY	Program Analyst III	1.00	41363	On Hold (by Dept)
LIBRARY	Librarian II	1.00	41364	On Hold (by Dept)
LIBRARY	Administrative Analyst I	1.00	41365	Depart Interview Process
LIBRARY	Account Clerk III	1.00	41366	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41367	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41368	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41369	Recruitment Plan in Progress
LIBRARY	Librarian I	1.00	41370	On Hold (by Dept)
LIBRARY	Library Assistant	1.00	41371	On Hold (by Dept)
LIBRARY	Librarian I, PPT	0.60	41372	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41373	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41374	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41375	Recruitment Plan in Progress
LIBRARY	Library Asst, PPT	0.60	41376	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41377	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41378	Recruitment Plan in Progress
LIBRARY	Library Asst, PPT	0.60	41379	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41380	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41381	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41382	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41383	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41384	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41385	Recruitment Plan in Progress
LIBRARY	Librarian I	1.00	41386	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41387	On Hold (by Dept)
LIBRARY	Librarian I, PPT	0.60	41388	On Hold (by Dept)
LIBRARY	Librarian I, PPT	0.60	41389	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41390	Recruitment Plan in Progress
LIBRARY	Librarian I, PPT	0.60	41391	Encumbered (linked to PT class)
LIBRARY	Library Aide, PPT	0.60	41392	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41393	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41394	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41395	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41396	Recruitment Plan in Progress
LIBRARY	Library Assistant	1.00	41397	Job Offer Extended
LIBRARY	Library Assistant	1.00	41398	Job Offer Extended
LIBRARY	Library Aide	1.00	41399	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41400	Recruitment Plan in Progress
LIBRARY	Library Assistant, Senior, PPT	0.60	41401	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41402	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41403	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41404	Recruitment Plan in Progress
LIBRARY	Library Assistant, Senior, PPT	0.60	41405	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41406	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41407	On Hold (by Dept)

DEPT	JOB CLASSIFICATION TITLE	FTE	PPC#	STATUS OF VACANCY/REQ
LIBRARY	Library Aide	1.00	41408	Recruitment Plan in Progress
LIBRARY	Librarian I, PPT	0.60	41409	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41410	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41411	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41412	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41413	Recruitment Plan in Progress
LIBRARY	Library Assistant	1.00	41414	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41415	Recruitment Plan in Progress
LIBRARY	Library Assistant, Senior, PPT	0.60	41416	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41417	Recruitment Plan in Progress
LIBRARY	Library Aide, PPT	0.60	41418	Recruitment Plan in Progress
LIBRARY	Library Assistant	1.00	41419	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41420	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41421	Recruitment Plan in Progress
LIBRARY	Library Assistant, Senior, PPT	0.60	41422	On Hold (by Dept)
LIBRARY	Library Assistant, Senior	1.00	41423	On Hold (by Dept)
LIBRARY	Library Assistant	1.00	41424	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41425	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41426	Recruitment Plan in Progress
LIBRARY	Librarian I, PPT	0.60	41427	On Hold (by Dept)
LIBRARY	Library Assistant	1.00	41428	On Hold (by Dept)
LIBRARY	Library Aide	1.00	41429	Recruitment Plan in Progress
LIBRARY	Librarian I, PPT	0.60	41430	On Hold (by Dept)
LIBRARY	Library Asst, PPT	0.60	41431	On Hold (by Dept)
LIBRARY	Library Aide, PPT	0.60	41432	Recruitment Plan in Progress
LIBRARY	Library Aide	1.00	41433	Recruitment Plan in Progress
LIBRARY Total		54.20		
RACE & EQUITY	Administrative Assistant II	1.00	41434	Depart Interview Process
RACE & EQUITY Total		1.00		
HSD	Office Assistant I, PT	0.53	41436	Encumbered
HSD	Food Service Worker, PT	1.00	41438	Recruitment Open (application intake)
HSD	Recreation Attendant I, PT	5.00	41439	Recruitment Plan in Progress
HSD	Recreation Attendant I, PT	5.50	41440	Recruitment Plan in Progress
HSD	Health & Human Svcs Prgm Planner	1.00	41446	Encumbered
HSD	Accountant II	1.00	41444	Filled
HSD	Administrative Assistant I	1.00	41435	Filled
HSD	Head Start Coach Coordinator	1.00	41543	Filled
HSD	Head Start ERSEA & Data Coord	1.00	41443	Filled
HSD	Head Start Facilities Coordinator	1.00	41442	Filled
HSD	Head Start School Ready Coord	1.00	41542	Filled
HSD	Head Start/EHS Sub Inst, PT	1.00	41441	Encumbered (PT staff)
HSD	Office Assistant I, PT	1.09	41437	Encumbered
HSD	Program Analyst II, PPT	0.99	41445	Filled
HSD Total		22.11		
PBD	Planner IV	1.00	41447	Depart Interview Process
PBD	Public Service Representative	1.00	41448	Depart Interview Process
PBD	Permit Technician II	1.00	41449	Approved (pending HR assignment)
PBD	Specialty Combination Inspector	1.00	41450	Depart Interview Process
PBD	Specialty Combination Inspector	1.00	41451	Depart Interview Process
PBD	Specialty Combination Inspector	1.00	41452	Depart Interview Process
PBD	Specialty Combination Inspector	1.00	41453	Depart Interview Process
PBD	Principal Inspection Supv	1.00	41454	Requisition Pending Approval

DEPT	JOB CLASSIFICATION TITLE	FTE	PPC#	STATUS OF VACANCY/REQ
PBD	Inspection Services Manager	1.00	41455	Requisition Pending Approval
PBD	Specialty Combination Inspector	1.00	41456	Depart Interview Process
PBD Total		10.00		
EWD	Urban Economic Analyst II	1.00	41457	On Hold (by Dept)
EWD Total		1.00		
HCD	Loan Servicing Administrator	1.00	41458	Encumbered (acting)
HCD	Housing Development Coordinator III	1.00	41459	Recruitment Plan in Progress
HCD	Accountant I	1.00	41460	Recruitment Plan in Progress
HCD	Program Analyst III	1.00	41461	Recruitment Plan in Progress
HCD	Hearing Officer	1.00	41462	Recruitment Plan in Progress
HCD	Hearing Officer	1.00	41463	Recruitment Plan in Progress
HCD	Hearing Officer	1.00	41464	Recruitment Plan in Progress
HCD Total		7.00		

Grand Total

183.91

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
OPW	Accountant I	1.00	Requisition Pending Approval
OPW	Administrative Analyst II	1.00	Eligible List Referred to Dept
OPW	Administrative Assistant II	1.00	Recruitment Plan in Progress
OPW	Administrative Services Manager II	1.00	Encumbered
OPW	Assist Director, Pub Works Agency	1.00	Encumbered
OPW	Assistant to the Director	1.00	Hire Authorization in Progress
OPW	Auto Equipment Mechanic	3.00	Requisition Pending Approval
OPW	Business Analyst III	1.00	Recruitment Plan in Progress
OPW	Capital Improvement Project Coor	3.00	Recruitment Plan in Progress
OPW	Clean Community Supervisor	1.00	Requisition Pending Approval
OPW	Construction & Maintenance Mechanic	1.00	Recruitment Plan in Progress
OPW	Construction & Maintenance Supv I	3.00	Depart Interview Process
OPW	Construction Inspector (Field)	3.00	Recruitment Plan in Progress
OPW	Construction Inspector Sup (Field)	1.00	Requisition Pending Approval
OPW	Construction Inspector, Sr (Field)	1.00	Depart Interview Process
OPW	Custodial Services Supervisor I	1.00	Depart Interview Process
OPW	Custodian	6.00	Recruitment Plan in Progress
OPW	Custodian, PPT	1.00	Recruitment Plan in Progress
OPW	Electrical Engineer II	1.00	Recruitment Plan in Progress
OPW	Electrical Painter	3.00	Recruitment Plan in Progress
OPW	Engineer, Assistant II (Office)	3.00	Recruitment Plan in Progress
OPW	Engineer, Civil (Field)	1.00	Encumbered
OPW	Engineer, Civil (Office)	1.00	Depart Interview Process
OPW	Engineer, Transportation Assistant	1.00	Encumbered
OPW	Engineering Intern, PT	1.00	Recruitment Plan in Progress
OPW	Environmental Program Specialist	1.00	Recruitment Plan in Progress
OPW	Facilities Complex Mgr, Asst	1.00	Requisition Pending Approval
OPW	Fleet Specialist	1.00	Encumbered
OPW	Gardener Crew Leader	1.00	Recruitment Plan in Progress
OPW	Gardener II	1.00	Depart Interview Process
OPW	Heavy Equipment Mechanic	3.00	Requisition Pending Approval
OPW	Heavy Equipment Operator	3.00	Recruitment Plan in Progress
OPW	Heavy Equipment Service Worker	1.00	Requisition Pending Approval
OPW	Heavy Equipment Supervisor	1.00	Encumbered
OPW	Litter/Nuisance Enforcement Officer	4.00	HR Assessment & Scoring
OPW	Maintenance Mechanic	3.00	Requisition Pending Approval
OPW	Management Assistant	1.00	Encumbered
OPW	Manager, Capital Improvement Pgrm	1.00	Requisition Pending Approval
OPW	Manager, Environmental Services	1.00	Requisition Pending Approval
OPW	Manager, Equipment Services	1.00	Requisition Pending Approval
OPW	Office Assistant II	1.00	Recruitment Plan in Progress
OPW	Painter	3.00	Requisition Pending Approval
OPW	Park Attendant, PPT	1.00	Depart Interview Process
OPW	Park Attendant, PT	3.52	Requisition Pending Approval
OPW	Park Equipment Operator	1.00	On Hold (Job spec revisions or FEHA)
OPW	Park Supervisor I	2.00	On Hold (Job spec revisions or FEHA)
OPW	Program Analyst II	1.00	Requisition Pending Approval
OPW	Program Analyst III	1.00	Approved (pending HR assignment)
OPW	Project Manager	2.00	Recruitment Plan in Progress
OPW	Public Service Rep, Sr	1.00	Depart Interview Process
OPW	Public Works Maintenance Worker	13.00	Depart Interview Process
OPW	Public Works Supervisor I	3.00	Recruitment Closed (screening apps)
OPW	Public Works Supervisor II	1.00	Recruitment Closed (screening apps)
OPW	Sewer Maintenance Leader	1.00	Depart Interview Process
OPW	Sewer Maintenance Worker	2.00	Recruitment Plan in Progress

DEPT	JOB CLASSIFICATION TITLE	FTE	STATUS OF VACANCY/REQ
OPW	Stationary Engineer	2.00	Requisition Pending Approval
OPW	Student Trainee, PT	2.00	Recruitment Plan in Progress
OPW	Support Services Supervisor	1.00	Encumbered
OPW	Tree Supervisor I	1.00	Depart Interview Process
OPW	Tree Trimmer	3.00	Recruitment Plan in Progress
OPW Total		111.52	

DOT	Accountant I	1.00	Requisition Pending Approval
DOT	Arboricultural Inspector	1.00	Requisition Pending Approval
DOT	Assistant to the Director	1.00	Depart Interview Process
DOT	Business Analyst II	1.00	Requisition Pending Approval
DOT	Construction Inspector (Field)	3.00	Requisition Pending Approval
DOT	Drafting/Design Technician, Sr	1.00	Encumbered (linked to TCSE)
DOT	Electrical Const & Maint Planner	1.00	Requisition Pending Approval
DOT	Electrical Engineer III	1.00	Requisition Pending Approval
DOT	Engineer, Assistant II (Office)	14.00	Requisition Pending Approval
DOT	Engineer, Civil (Office)	2.00	Requisition Pending Approval
DOT	Engineer, Civil Principal	1.00	Requisition Pending Approval
DOT	Engineer, Transportation	4.00	Requisition Pending Approval
DOT	Engineer, Transportation Assistant	1.00	Encumbered (underfilled)
DOT	Engineer, Transportation Supv	1.00	Eligible List Referred to Dept
DOT	Engineering Technician II (Office)	1.00	Eligible List Referred to Dept
DOT	Heavy Equipment Operator	3.00	Requisition Pending Approval
DOT	Office Assistant II	1.00	On Hold (by Dept)
DOT	Parking Control Technician, PPT	5.25	Requisition Pending Approval
DOT	Program Analyst I	1.00	On Hold (by Dept)
DOT	Program Analyst II	5.00	Eligible List Referred to Dept
DOT	Program Analyst III	2.00	On Hold (by Dept)
DOT	Project Manager	1.00	HR Assessment & Scoring
DOT	Project Manager II	1.00	Depart Interview Process
DOT	Public Works Maintenance Worker	11.00	Recruitment Plan in Progress
DOT	Public Works Supervisor I	1.00	HR Assessment & Scoring
DOT	Public Works Supervisor II	2.00	HR Assessment & Scoring
DOT	Sign Maintenance Worker	2.00	Requisition Pending Approval
DOT	Spatial Database Analyst III	1.00	Requisition Pending Approval
DOT	Student Trainee, PT	1.00	Encumbered (linked to PT class)
DOT	Surveying Technician, Sr (Field)	1.00	Requisition Pending Approval
DOT	Traffic Sign Maker	1.00	On Hold (Job spec revisions or FEHA)
DOT	Transportation Planner, Senior	1.00	Requisition Pending Approval
DOT Total		74.25	

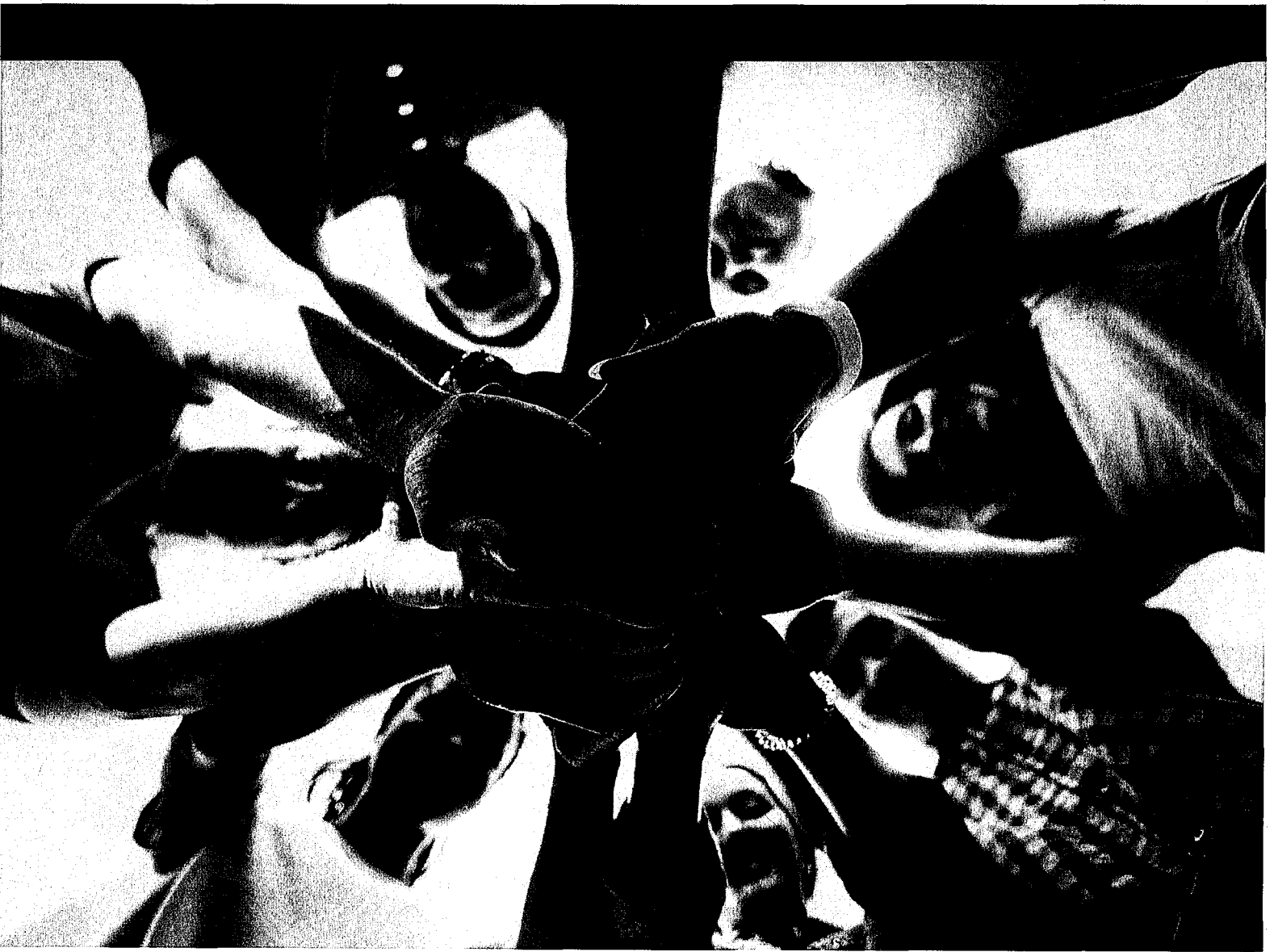
Grand Total**185.77**

TALENT 2.0

*A Modern Approach to Attracting & Retaining
Top Talent in Local Government*

Spring 2018 Report

Cal-ICMA
California Consortium
A State Affiliate of **ICMA**
Talent Initiative



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CAL-ICMA TALENT INITIATIVE

Cities, towns, counties, and special districts across the state are experiencing persistent challenges attracting and retaining qualified employees. These concerns led to the creation of the Cal-ICMA Talent Initiative.

The Talent Initiative launched with the goal to engage chief executives, human resources professionals, and emerging leaders in a conversation about effective local government talent strategies.

We began with three questions:

- What are the kinds of talent challenges that confront cities, counties, and special districts in California?
- What obstacles hinder our efforts to address talent challenges?
- What are the best practices from public and private sectors, culture-building strategies, and other resources we can use to better attract, retain, and grow talent?

This report presents the results of the outreach and research conducted by the Talent Initiative Team and provides a resource for local government leaders seeking to improve how they attract and retain and develop future talent.

ACKNOWLEDGMENTS

Completion of this undertaking could not have been possible without the participation and assistance of so many people whose names may not all be enumerated. Their contributions are sincerely appreciated and gratefully acknowledged. However, the group would like to express their deep appreciation particularly to the following:

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Rita Ossolinski, ICMA

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Nat Rojanasathira, Town of Danville
Frank Benest, ICMA

EXECUTIVE SUMMARY

Purpose

The purpose of the Cal-ICMA Talent Initiative is to help managers in local government focus on the business imperative of attracting, retaining, and growing talent.

Assessment Activities

To assess the talent challenges facing local governments in California, the Cal-ICMA Talent Initiative Team reviewed current talent management literature, administered a survey of 372 senior managers, conducted interviews with private and non-profit sector thought leaders, and facilitated 11 focus groups throughout California involving 272 local government managers.

Key Findings About The Talent Challenge

Local governments have not adequately prepared for the baby-boomer retirement wave and are struggling to fill the void; yet there is reason for hope. Local governments possess a potential advantage in attracting and retaining today's talent. This is because today's work force seeks meaning in their work and wants to make a difference. At its core, the purpose of local government is to serve communities and provide for a high quality of life for residents. Careers in local government are an opportunity to contribute to building communities – what better way to have impact?

Local governments can no longer rely on “stealing” talent from other agencies; more than ever, public agencies need to grow their own talent. Employees who are learning and growing are more likely to stay with an organization. Talent development must be integral to every manager's core duties. Successfully attracting and retaining talent requires a positive organizational culture. A traditionally bureaucratic governmental culture inhibits innovation, discourages experimentation, and turns away the best talent. Retooling organizational cultures to better attract and retain early-career talent will enhance organizations for all employees and positively affect performance and productivity.

Challenges in Attracting, Retaining and Growing Talent

Managers who participated in the 11 focus groups identified an array of challenges that need to be addressed. They also expressed the need to engage elected officials in a conversation about the issues. A few of the key challenges they identified include:

Attraction/Recruitment

- Agencies are experiencing a large number of vacancies in key positions, and there are fewer seasoned department heads and other senior managers to recruit from other local government agencies.
- Internal candidates frequently lack sufficient management experience and leadership (“soft”) skills.
- The hiring process in local governments can be lengthy and includes factors that make it less competitive with other sectors, including testing requirements and minimum qualifications that can disqualify untraditional candidates.
- Job specifications and operating practices (e.g., job duties, work schedules) in local government organizations can be inflexible.
- Agencies do not allocate sufficient resources to market or brand their organizations.

Retention & Development

- Local governments have not made training and professional development a priority.
- Long commutes, high-cost housing, and lack of child care all work against retention.
- Traditional or even “stodgy” organization cultures are not inspiring for early-career professionals.
- The deep recession and restructuring of organizations have resulted in the elimination of mid-manager and other “step-up” positions.

- Political in-fighting and uncivil discourse discourage talented professionals from entering or staying in the public sector.
- Mid-career professionals are reluctant to pursue higher-level positions when there are adversarial politics and impacts on work-life balance.

Themes from Thought Leaders

The Talent Initiative Team conducted four interviews with recognized “Thought Leaders” from the technology and non-profit sectors in order to enhance our understanding of how to better compete for talent. Themes included:

1. Early-career professionals want to have a role in addressing social problems; they want to have an impact.
2. These professionals lack an understanding that local governments are in the business of solving community problems; the profession must do a better job of branding this message and adapting organizational culture to engage enterprising millennials.
3. Talent initiatives need the active encouragement and support of senior leadership.
4. Local governments must tell their story, especially regarding the opportunity to serve and make a difference.

Findings & Recommendations

The Talent Initiative report identifies a variety of actions, both large and small, that local governments can make to increase their chances for successfully attracting, retaining, and growing talent.

A fundamental recommendation of this effort is to **ensure that every manager understands that the professional development of their employees is a primary job duty and that all employees take responsibility to grow and develop in their work.** If both leaders and employees embrace their roles, all other recommendations can follow.

Assistance from Professional Organizations

Professional organizations play an important role in championing local government as a noble, rewarding, engaging, and thriving job sector. Therefore, regional and professional organizations should be enlisted to assist advancing the Talent Initiative by:

- Developing sample branding materials including enticing job announcements that all government agencies can customize and use in their efforts to attract talent (Cal-ICMA with ILG)
- Hosting educational sessions that highlight the importance of attracting, retaining, engaging, and developing talent and address the challenges identified through the Talent Initiative (Cal- ICMA, LCC, MMANC/SC, CSAC, and others)
- Promoting shared service models for delivering training and development programs on a regional basis (CPAAC)
- Expanding ICMA student chapters and outreach efforts to universities to engage early-career professionals (MMANC/SC)
- Focusing on leadership development (with emphasis on “soft skills”) for mid-managers and aspiring leaders (Cal- ICMA, MMANC/SC, ELGL)
- Conducting “Future County Department Heads” and “Future City Manager” seminars (CACE, CSAC Institute, Cal-ICMA)
- Drafting model language for employment agreements to provide greater flexibility addressing staffing challenges (CALPELRA)

Key Recommendations

Attracting Talent

- Eliminate minimum qualifications for entry-level positions
- Update job postings to focus on meaning, values, learning, skills development, and organizational culture
- Hire for potential and learning agility vs. technical skills and knowledge

- Expand recruitment reach by using social media sites and new technologies
- Offer internships or fellowships to students, independently or through the ICMA Local Government Management Fellowship Program

Retaining and Developing Talent

- Assess the leadership pipeline and develop home-grown talent
- Provide staff with training and professional development opportunities annually, develop specific learning outcomes
- Offer mentoring and coaching to aspiring professional
- Utilize multi-departmental and cross-functional project action teams
- Use interim or acting assignments or provide job rotation opportunities to fill roles or “try out” staff
- Ensure that all supervisors are accountable for the development of their staff and follow up regularly

Retooling Organizational Culture

- Use on-boarding activities with new employees to engage them with top management and discuss organizational values and “What we care about”
- Incorporate more flexibility in scheduling, holiday closures, and other ways to do our work
- Create opportunities for face-to-face interactions with top management
- Create a “culture of appreciation” and recognition
- Promote more autonomy for employees and provide opportunities to work on the whole project

- Increase employee engagement, including active listening, engaging them in problem-solving, and promoting a sense of community and belonging
- Promote a practice of ongoing performance conversations with employees (not just annual performance evaluations)

Encouraging Employee Initiative

- Promote growth and development as a core element of each employee’s job responsibilities
- Encourage employees to identify their career development goals and support their ability to achieve them
- Invite each employee to include desired professional development plans in their regular reviews with a supervisor

Follow-Up Action Steps

The Cal-ICMA Talent Initiative Team seeks to advance the recommendations contained in this report by:

- Updating the Cal-ICMA website to include tools, a knowledge-sharing database, and other resources for organizations to use in implementing the Talent Initiative locally.
- Continuing to solicit exemplary programs and examples of best practices that can be shared via the Cal-ICMA website.
- Learning from the private sector and adapting and communicating relevant practices.
- Engaging professional associations in discussions about their roles and contribution in implementing these recommendations; developing an implementation plan.
- Creating a “Great Places” program to showcase talent management efforts and acknowledge organizations that are implementing the best practices contained in this report.

Further Information

For further information about the Cal-ICMA Talent Initiative visit

<https://icma.org/cal-icma/talentinitiative>

or contact:

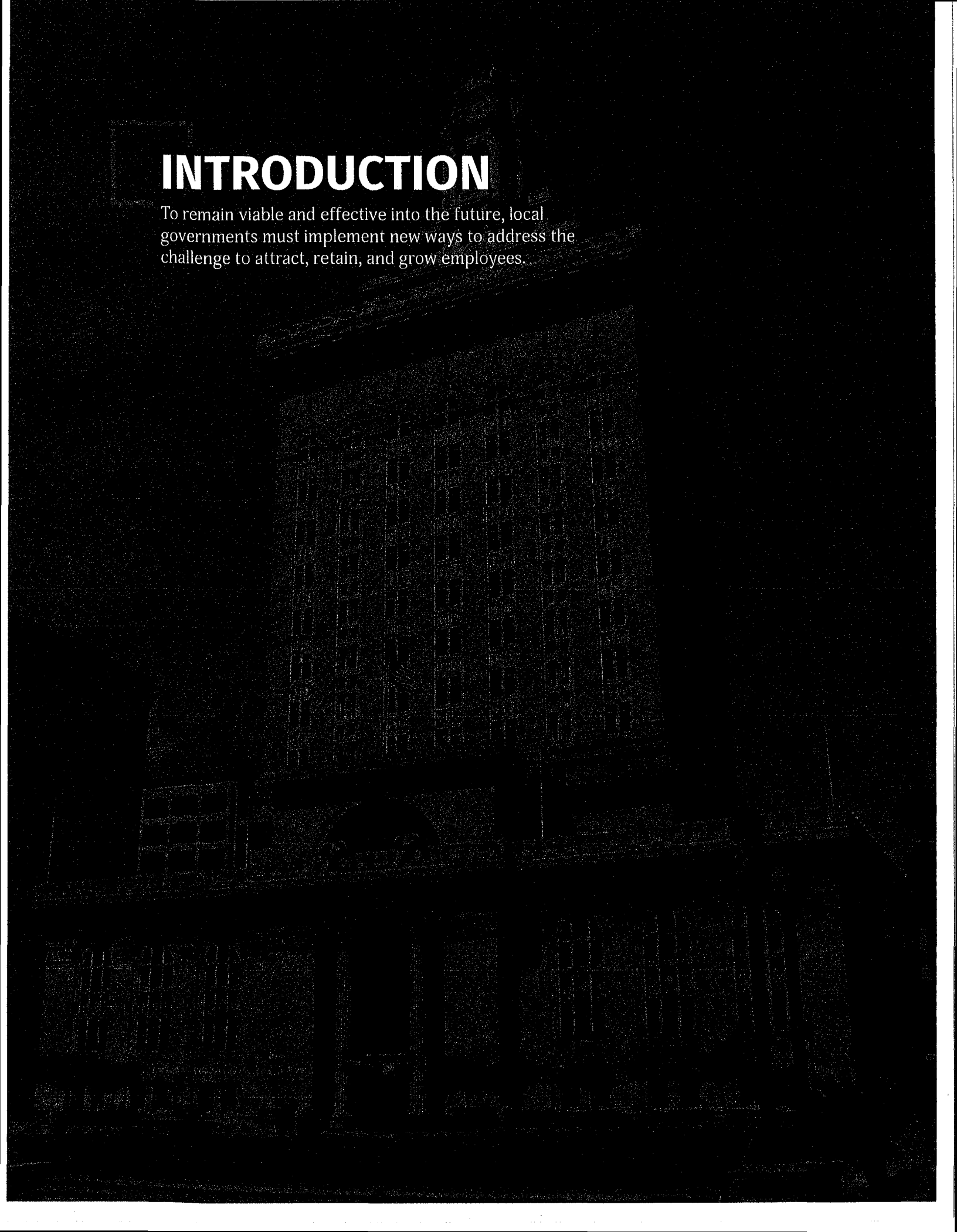
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INTRODUCTION

To remain viable and effective into the future, local governments must implement new ways to address the challenge to attract, retain, and grow employees.



The competition for talent in California is fierce. Times are changing and more than ever before, today's workforce is willing to move between agencies—and sectors—to find workplaces that are engaging and will help them meet their personal goals. If we don't reconsider our collective appeal and change our practices our staffing challenges will persist.

The Cal-ICMA Talent Initiative was created to help chief executives, human resources officers, and emerging local government leaders focus on the business imperative of attracting, retaining, and growing talent. As such, we engaged leaders in the following conversations:

- What are the talent challenges that confront cities, counties, and special districts in California?
- What obstacles hinder efforts to address talent challenges?
- What best practices can be used to better attract, retain, and grow talent?

Over the past two years, the Cal-ICMA Talent Initiative Team solicited feedback about the persistent talent-related challenges in local government. Nearly 400 surveys were completed by chief executives, human resources directors, middle managers, and emerging leaders. Additionally, 11 focus group meetings totaling 272 individuals were held throughout the state—from San Diego County and the Coachella Valley to the Central Coast, Bay Area and the Capitol Region. The team also conducted interviews with thought leaders from the private sector.

A number of themes emerged. First and foremost, was the recognition that local governments have not done enough to build an adequate talent pipeline to address the staffing needs of today and the future.

Boomer Impacts

The baby boomer generation—those born between 1946 and 1964—responded in great numbers to President John F. Kennedy's call for service: "Ask not what your country can do for you, ask what you can do for your country." Today, baby

boomers comprise a large share of the public workforce—especially in senior management—and as their retirement wave hits, there are significant implications for local government.

As baby boomers retire in the next decade, Talent Initiative findings revealed a critical concern: the readiness of those behind them. Over the past few decades, local governments have trended toward flatter organizations. This trend peaked during recent recessionary times as additional mid-manager positions were cut. In addition, training budgets were reduced or eliminated. Now, as boomers are vacating key leadership roles many agencies face the reality that their leadership pipeline is insufficient.

The next generation of leaders will emerge; however for many organizations it will be rough road to get there. Agencies will encounter challenges that demand fresh thinking and an imperative to embrace "talent development" as an established tenet of its organizational philosophy. Importantly, for this transition to be successful, employers must learn and understand the motivations of their future leaders.

Game Changers

Increasingly, local governments are filling open positions with the next generation of employees. This new generation has a set of priorities and professional values that are different from those who came before them.

Research has shown that at a macro level employees of each generation seek different meaning and purpose in their work. For example, baby boomers are described as work-centric and define themselves by their professional accomplishments. Millennials (born between 1980 and 1997) do not define themselves simply by their profession. They seek meaning in the work they do and value having a life-work balance.

In his book, *Drive!*, author Daniel Pink declared, "Meaning is the new money." While previous generations were satisfied with process-based work that offered consistency and reliability, today's workforce wants to be creative, collaborative, and inspired by what they are doing.

Clear organizational goals, translated into the day-to-day work experience, are one of the strongest motivators of younger professionals. The ability to provide rewarding, tangible, service-focused work at the local level can be a competitive advantage for attracting and retaining talent. Local government must capitalize on this advantage.

The question remains whether the new workforce recognizes government as a force for good and a means to translate their passion into making a difference at the ground level.

Leading professional associations play a role in championing local government as a noble, rewarding, and engaging job sector. Specifically, the Talent Initiative concluded that our collective success hinges on our ability to articulate what local government can offer prospective employees and how those advantages are communicated. This is referred to as the “Employee Value Proposition.” The workforce of tomorrow is multi-generational and highly diverse. The most successful organizations will be those that best understand this fact.

Organizational Culture

Another key finding the Talent Initiative is the importance of organizational culture and its implications on employee retention. According to a June 2017 Gallup poll, six in 10 millennials are looking for new employment opportunities. Leadership practices affect how employees feel about their organization and how long they choose to stay. For many of today’s employees retention is linked to learning, challenge, and engagement. When employees work in an environment that helps them thrive and grow, they are more likely to stay.

In light of this, organizations must let go of their concern that developing employees will simply result in losing them to another agency (“We don’t want to be a training ground for other organizations”). Retention strategies must extend beyond compensation and incentive packages. To be successful, they must include fostering a work environment that engages employees in continuous learning and instills a sense of purpose.

Agencies can no longer rely on the practice of “stealing” employees from each other. More than ever, public agencies are competing for talent—and to be successful, they need to re-brand and reposition themselves as learning organizations that foster innovation, engagement, and personal satisfaction.

ATTRACTING & RECRUITING TALENT

Without the right employees, no organization can achieve its mission. Gone are the days where local governments can be passive in their recruitment efforts. To be successful, agencies must accept that they are in competition for the best talent.

The only exposure to the inner-workings of local government for most Americans is the City of Pawnee, Indiana, the fictitious community featured in NBC's hit sitcom, *Parks and Recreation*. For many, local government work remains a mystery. This suggests a great opportunity to tell the story of how local government services are fundamental to the daily lives and activities of all Americans. Research has shown that across industries a whopping 50% of employees lack a sense of meaning and purpose at work. A career in local government offers a strong community-oriented mission and focus on public service. This should create a competitive advantage for attracting talent.

An important hurdle to overcome is the distrust of government held by many. A 2017 survey from the Pew Research Center reported an overall level of trust in government at near historic lows: only 20% say they trust the government to do what's right always or most of the time; 68% say they trust the government only part of the time; and 11% state that they never trust the government to do what's right. Local governments are viewed in a more positive light than other levels of government; however, to combat this general perspective, local governments must work to build trust and promote the profession as a mission and service-oriented field.

Today's workforce has the power to affect positive change in attitude toward local government. They are asking the following questions:

- Are there big problems to solve in local government?
- Am I interested in solving these big problems?
- Will I be empowered to help solve the big problems?

Leaders must listen, respond, and engage the workforce to demonstrate that employees are empowered to solve community problems. In addition, agencies must modernize and build an adaptable public sector that is prepared to address 21st-century challenges.

Challenges to Replenishing Talent

The Center for State and Local Government Excellence reported in 2017 that the recruitment and retention of qualified public sector employees tops the list of workforce challenges. This finding was echoed by a 2012 study by the Society for Human Resource Management forecasting that by 2022, talent development will be the highest priority for human resource functions.

“Leaders must listen, respond, and engage the workforce to demonstrate that employees are empowered to solve community problems.”

Human resource officers are signaling a looming workforce crisis. And findings of the Talent Initiative offer the top five reasons for this phenomenon. These are listed below and explored in the following sections:

- Retirement
- Candidates
- Compensation
- Bureaucracy
- Mismatch

RETIREMENTS

The baby-boomer “retirement wave” is here. In April 2017, the City of Los Angeles reported that over 40% of its 45,000 employees would be eligible for retirement by 2018. This trend reflects a larger issue for employers across sectors, as over a quarter-million U.S. employees reach 65 years of age each month. As governments generally tend to have a larger share of these employees than the private sector, the impact is even greater on us.

Talent Initiative participants reported large numbers of vacancies in key positions, compounded by fewer seasoned department heads and other senior managers to recruit from other local government agencies. In many cases, this has resulted in the loss of valuable institutional knowledge, the disruption and short-staffing of departments, and lengthy and costly (replacement) recruitment processes.

Recommendations

- 1.1 Use retirees. Taking a cue from the federal government, consider a phased retirement plan that allows employees the opportunity to work part-time after reaching a certain age. As part of the arrangement, require that a portion of the employee's time be spent mentoring their replacement. Alternately, recruit retired workers—on a temporary basis—to help fill a knowledge gap as they train younger workers to take on legacy assignments.
- 1.2 Succession plan. Make succession planning a priority and an ongoing business practice. This can be done in a number of ways—for example, through confidential discussions between employees and managers about retirement plans and a plan to transfer knowledge in anticipation of a critical, soon-to-be-vacate position. Succession planning can be good for morale; investing in workforce development and promoting from within encourages staff to take on new responsibilities and sends the message that they are valued.
- 1.3 Anticipate needs. Monitor external factors that could affect your organization's ability to recruit employees—for example, economic drivers and the size of college graduating classes. Local governments should also look inside their organizations to see who will be retiring, who's likely to move on, and what talent is available to fill anticipated vacancies over the next three to five years. Additionally, agencies must invest in training for its employees to meet changing industry needs and implement best practices.

CANDIDATES

A common theme revealed by city managers in the focus groups is that internal candidates are often not ready to move into management roles where they are experiencing high rates of turnover. Promoting or hiring inexperienced managers is considered risky, as these candidates—although having the technical skills—may lack management or leadership skills.

The pool is even smaller for positions that require both strong technical skills and management experience. In addition, fewer candidates have the necessary certifications to take on new roles (i.e., engineers, water treatment plant operators, and agricultural commissioners), and others lack the comprehensive training legally required for public safety officers, and health and social service workers.

Local governments have been slow to emerge from the Great Recession. According to a June 2016 Governing article, "State and local governments have 500,000 fewer employees than they did in 2008 due to layoffs, hiring freezes, and a growing number of eligible employees choosing to retire." With fewer workers in the pipeline, local governments may simply not have enough people available in their organizations for promotions.

Recommendations

- 2.1 Open up recruitments. Local governments must revise their job descriptions and minimum qualifications in order to attract a broad pool of candidates. In fact, qualified private sector candidates are often weeded out of the recruitment process. Local governments should also market and advertise positions differently—e.g., selling the values of public sector work and posting job announcements using private sector techniques and platforms (i.e., LinkedIn, Glassdoor, Indeed, industry-specific websites, etc.).
- 2.2 Promote government. Local governments need to better tell a story about the value and nobility of public service. This requires a concerted effort from professional

organizations (e.g., ICMA and MMANC/SC) and cities banding together. It also requires proactive approaches that outreach to high schools and universities to promote the values of public service careers. Initiatives worth exploring: ICMA's "Life, Well Run" campaign, the City of Sacramento's "Summer at City Hall" program, and ILG's "Engaging Youth" project.

- 2.3 **Hire for potential.** Hiring for potential rather than just hiring for experience—especially for entry-level positions—can pay huge dividends in building long-term talent. Candidate attributes like curiosity, determination, and the ability to "Learn on the fly" can yield new organizational perspectives, a culture unafraid of new challenges, and an insightful talent pipeline. The bonus: employees often feel loyal to organizations that "gave them their shot," which can lead to greater retention.
- 2.4 **Grow talent.** To attract the next generation of talent, local governments must become learning organizations. In doing so, they must invest in internship programs (like the ICMA Local Government Fellowship Program) that attract talent and provide challenging assignments. These opportunities help agencies identify future talent and fill work gaps, while also availing interns with relevant experience for entry-level positions. Additionally, interns can provide insight to emerging workforce drivers, and serve as a brand ambassador to recruit other interns—and a future workforce.
- 2.5 **Be flexible.** While the civil service provides structure and process for personnel management, for many organizations it is often many decades old. This means that the rules and protocols can be disconnected with today's market realities and employee needs. Left as is, outdated civil service rules will put local governments into an even more serious labor crisis.

COMPENSATION

A longstanding benefit of the public sector has been its stable pension and retirement system. This has been a key component of an agency's employee recruitment strategy. However, with the 2012 passage of the California Public Employees' Pension Reform Act (PEPRA), adjusted pension tiers and lower benefits for new hires may no longer offer a competitive edge for local governments.

Geographic challenges also exist. Local governments in rural areas cannot offer salaries competitive to more urban areas. Housing in urban areas is costly and there is a shortage of affordable childcare options, resulting in employees commuting long distances from areas with lower costs of living. Another complexity to this reality: dual-income households must weigh the mutual benefits of relocation, both financially and based on family needs.

Finally, the private sector offers high compensation packages—including bonuses—for in-demand technical positions like health care workers, doctors, engineers, and IT and healthcare professionals. Adding to this is the perception of challenging projects, career progression opportunities, support systems, and flexible work schedules—in contrast to a perception that the public sector is rigid, dull, and lacking opportunities for personal and professional growth.

Recommendations

- 3.1 **Consider options.** In a post-PEPRA world, local governments are challenged to find ways to provide retirement security, particularly as an employee retention and attraction strategy. Options for consideration: employer-sponsored deferred compensation plans, enrollment in Social Security, extended-term life insurance policies, and contributions toward retiree health benefits or long-term care coverage.
- 3.2 **Showcase strengths.** Studies show that today's workers value a high quality of life. For rural agencies that cannot offer

high compensation packages, employee attraction strategies should highlight local community strengths—recreational and cultural amenities, high-performing schools, affordably priced housing, small-town charm, and proximity to the “Big city.”

- 3.3 **Provide incentives.** A variety of perks can help attract top talent to local government—from childcare subsidies and student loan repayments to signing bonuses, housing assistance, and critical position pay. While these suggestions can have cost impacts, agencies should focus on providing incentives that are most important to its employees and which align with the values of its organizational culture.
- 3.4 **Offer growth.** Governments take on large, important projects that can offer major growth and career opportunities. As such, these should be used as selling points for hard-to-fill jobs that compete with the private sector. According to *Governing Magazine* contributor Elizabeth Kellar, the message to workers should be “Wanted: Smart people with a passion to fix things so our society is a great place to live.”

BUREAUCRACY

According to NYU professor Paul Light, the government’s reputation for bureaucracy drives away potential candidates. Case in point: local government’s recruitment process. Many agencies are locked in outdated processes (e.g., testing requirements and minimum qualifications) that stand in the way of bringing in the best and the brightest. While these procedures may be fine for recruiting employed, mid-career professionals, they aren’t nimble enough to attract those who often need a job quickly for income. Governments can take up to six months to fill positions and may lose candidates to the private sector where recruitments can be completed in a matter of days.

There is also the simple matter of job descriptions and titles. They are often hard to understand, can sound dry and uninteresting, and often use industry-oriented language. They also visually appear stodgy yet overwhelming, as they are

dominated by text that over-describes the duties and requirements of the position.

Agencies need to revamp their recruitment approach and incorporate new practices to effectively showcase positions and their importance to the organizational culture. Governments also need to look “Outside the box” when advertising job openings, going beyond the use of traditional government websites and trade journals if it expects to attract fresh talent.

Recommendations

- 4.1 **Go brand.** Agencies are in a prime position to brand themselves—to help create an image of their organization to potential employees. In doing so, local governments should consider updating job descriptions to emphasize meaning, values, learning, and skills development. Job announcements can also be retooled to include a narrative of the organizational culture, and to reposition the tone of “Are you good enough to work for us?” to “Why you want to work with us!”
- 4.2 **Streamline process.** Shorten hiring processes and make them responsive to avoid losing high-performers to other jobs. Agencies should also employ an “open until filled” protocol that allows managers to quickly interview a candidate rather than wait for the conclusion of the application period.
- 4.3 **Improve the experience.** Put yourself through your agency’s job application process. Pretend you’re the job seeker and get a feeling for any improvements that can help refine a candidate’s application experience. Consult with other human resource professionals to ensure revisions meet legal mandates and incorporate industry best practices. And finally, gather survey data and other analytics about why candidates are or are not applying.
- 4.4 **Think mobile.** The current generation is mobile. This means that job seekers now use a smartphone for their job search. Local agencies—if they haven’t already— should

invest in online human resources software to ensure that job postings and online applications are easy to find and apply to from a mobile device. Not only does this optimize candidate interest, but expedites internal application reviews.

- 4.5 **Be social.** Online platforms like LinkedIn, Facebook, and Twitter, are becoming the standard for job searches. When agencies use these tools for job advertisements, it casts a wider recruitment net. It also conveys a perception that an organization is progressive. But don't limit your social media presence to recruitment—use these platforms to tell your agency's story and the accomplishments of your employees.

MISMATCH

A mismatch is apparent between the new workforce and the environment of local government.

Today's employee is motivated by meaningful work that offers passion and purpose. They also question the way "Things have always been done." The bureaucracies of local government may prevent employers from capitalizing on the creative insights of their emerging talent. It could also result in higher rates of turnover if these employees don't feel a sense of purpose—and pride—in their employer.

A large number of agencies have not fully explored what their workforce wants from a career in public service—in other words, what makes them tick. The needs and concerns of a baby boomer are not the same as a millennial. While both generations have a passion for public service, younger workers often have debt and limited experience that may affect their future career choices. As for those who prefer to stay in government, they want clear opportunity paths to develop their skills and careers. Governments need to commit to that in order to remain competitive.

Many young professionals are digital natives who have grown up with technology. Many studies cite modern technology as one of the most important aspects of their workplace. Today's generation of

workers expect experience with new technologies to remain competitive in the job market and do their jobs. Many public agencies operate on legacy systems that fall behind the expectations of today's digital generation.

Recommendations

- 5.1 **Offer feedback.** Most employees want feedback, as they're used to receiving instantaneous feedback from technology, and have grown accustomed to asking questions and sharing opinions. Having engagement strategies in place—and marketing them as a recruitment tool—can have a positive impact on attracting employees and cultivating their career satisfaction in local government.
- 5.2 **Articulate vision.** Employees want to know the big picture of their employer, and they are curious in all work-related matters—even if it's outside their defined area of responsibility. Agencies should make a concerted effort to articulate and reinforce organizational values that provide today's employees with a purpose for their work. If not, they can expect to lose this talent to other organizations that do make it a priority.
- 5.3 **Express value.** Investing in employees by helping them develop new skills not only benefits organizations but also shows employees that they are valued. Offer cross-cutting and stretch assignments that meet the desire to gain experience and provide for opportunity paths. If feasible, look to also create progressive work environments that allow for collaboration (e.g., open concept offices), offer flexible work schedules, and reward innovation.
- 5.4 **Teach generationally.** Today's workplace is multi-generational—in fact, five generations are working side-by-side. Studies show that colleagues learn more from each other than they do from formal training. It is more important than ever to establish a culture of coaching across age groups. For example, a reciprocal mentoring

program can allow younger staff to teach older colleagues about technology trends. Meanwhile, the more experienced employee shares institutional knowledge with the younger worker. Such an approach can lessen generational tensions in the workplace while providing the collaborative environment younger professionals desire.

- 5.5 **Embrace technology.** The majority of today's workers grew up surrounded by digital technology. If they don't have the technology tools they want or need, they may look elsewhere. While public sector budgets are limited, agencies need to explore the types of technology investments they lack—not only for system improvements and efficiencies, but also as a means of building a workforce that will carry local government into the future.
- 5.6 **Start discussions.** According to Gallup's recent State of the Workforce report, flexible scheduling and work-from-home opportunities play a major role in an employee's decision to take or leave a job. The public sector will eventually be pushed into breaking down long-established structures and policies to accommodate these needs. While this could take years, even decades, discussions with elected officials on future workforce trends need to begin now (e.g., work/life efforts).

RETAINING & DEVELOPING TALENT

Local government leaders recognize that talent is mobile and that they must create “organizational stickiness” that encourages employees to stay, grow, develop, and contribute to the long-term health of the agency.



In recent years, California's unemployment rate has been at historic lows. To remain competitive, many local governments invested more time and resources to be attractive to recruits (e.g., competitive salaries, benefits packages, relocation fees) than in employee retention. While this can be an effective strategy, an over-emphasis on talent attraction and hiring without equal emphasis on talent retention and development may create problems for local governments.

As the economy continues to strengthen and job fluidity reduces tenure, these factors will put even more pressure on local governments to retain the talent they have worked so hard to secure. Agencies without a holistic approach to the entire employee lifestyle— from attraction through onboarding and training—may lose talent and be tasked with an continuous loop of new hiring.

The Case for Retention

Simply put, retention refers to the techniques employed by an organization to keep its employees for a longer period of time. So why is this important? According to Talent Initiative participants, a focus on reducing employee turnover makes sense for the following reasons:

- **Turnover is expensive.** The Society of Human Resource Management estimates that every time an organization replaces a salaried employee, it costs six to nine months' salary on average. For an employee making \$70,000 a year, that could mean \$35,000 to \$52,000 in recruiting and training expenses. As for costs in replacing a department head or chief executive officer/city manager, the Center for American Progress predicts an even higher price tag (e.g., twice the annual salary).
- **You lose institutional knowledge.** When top talent seeks employment elsewhere, an organization is losing those individuals' talents, ideas, and institutional knowledge. Although there are tools and strategies that agencies can put into place for retaining institutional knowledge (e.g., documentation, exit interviews) this does not fully replace the benefits of an employee who has first-hand knowledge of the organization and

its specific processes. Importantly, a long-standing positive employee can be integral to maintaining and modeling the desired organizational culture.

- **It creates inconsistency.** If an organization or department has a revolving door of employees, it is difficult to maintain momentum. Instead of managers focusing on larger goals, they are required to retrain new employees, while also keeping their other employees engaged.
- **It affects camaraderie.** Studies consistently show that peers rank among the top reasons for why employees love their job. But if organizations experience a transient workforce, this could easily prevent a positive work culture of inter-office bonding and productivity. This could have a ripple effect that leads more employees to leave the organization.
- **People notice.** Community members interact with local government on a regular basis. When employees they are used to dealing with leave—especially in numbers—it signals trouble. This can also create negative press, cause political conflict, and be publicized on sites like Glassdoor, which can impact future recruitment efforts.

“An over-emphasis on talent attraction and hiring without equal emphasis on talent retention and development may create problems for local governments.”

Employee Retention & Development Strategies

According to Talent Initiative participants, there are six main reasons why employees leaves an organization:

- Lack a work-life balance

- Compensation is emphasized and other “soft” benefits are absent
- Undefined or negative organizational culture
- Not enough employee coaching and feedback
- Managers lack skills and training
- Professional development is not a priority

The following pages further elaborate on these themes and include recommended strategies to improve employee retention.

BALANCE

The private sector is making the business case for work-life balance. And according to Talent Initiative participants, local government should pay attention.

Today’s workforce has many competing responsibilities: work, children, housework, volunteerism, elderly parent care—and the list goes on. These commitments place stress on individuals and families, resulting in a work-life conflict that has physical and mental health implications.

Data from the U.S. Census Bureau shows that Californians spend an average of 28.9 minutes commuting to work each day, giving California the fifth-worst commute times in the nation. In metropolitan areas such as the San Francisco Bay Area, Los Angeles and San Diego regions, workers can often travel as much as one-and-a-half to two hours to work each day. Long commutes contribute to the stress of employees which translates to lower productivity, greater absenteeism, and less connection to the team and work environment.

A report by the Society for Human Resource Management found that 89% of human resource professionals reported an increase in employee retention by simply offering flexible work arrangements. Flexible work scheduling does not typically mean fewer overall work hours. Rather, it refers to adapting work schedules to accommodate family and personal needs such as school pick-up/drop-off, attending sporting/cultural events, and

daycare needs. It also can increase productivity for those employees that are more focused in off-peak times or result in fewer life distractions.

Work-life balance offers employees a greater sense of control and ownership over their lives. Local governments that utilize live-work policies can provide a competitive edge for employee attraction. Such policies also increase employee loyalty and the continuity of in-house expertise. While the nature of public agencies does not allow some positions to have flexible schedules (e.g., public safety, building inspections, front counter operations), other positions (e.g., analysts, information technology technicians, finance, planners, engineers) may be suited for greater flexibility. To avoid creating an environment of “classes” (those who have flexibility and those who do not), public agencies that have successfully implemented flexible scheduling have been transparent to all employees about how some positions do not allow for as much flexibility.

Recommendations

- 6.1 **Provide flextime.** Flextime is a type of alternate schedule that gives an employee latitude in choosing their particular hours of work, or freedom to change work schedules from one week or the next depending on personal needs. Under this arrangement, employees are typically expected to be at work during certain core hours of the workday. They are given the opportunity to choose—within certain parameters—their start and stop times as long as they work the required number of hours each day.
- 6.2 **Go home.** Another flexible work arrangement, telecommuting, allows employees—on a regular, predetermined basis—to working from home or another site. Technology such as video conferencing (e.g., Skype for Business or Google Hangouts) can show that employees are working from home and are available to chat or video conference. Studies have shown that employees who work just one or two days a week from home are not only more productive but less likely to quit their jobs. They also work at peak times with

fewer interruptions and distractions, have more freedom from peer pressure, and spend less time commuting.

- 6.3 **Compress schedules.** A compressed work week allows employees to work the normal total number of hours, but complete those hours in fewer days. The most common variation of this work week is called the 4/10, in which employees work four 10-hour days instead of five eight-hour days. This type of arrangement—along with the 9/80—is becoming more common, employees are said to accomplish more from a compressed work week than the typical “9 to 5” model. With planning, workers can have a compressed schedule while continuing to provide reliable service delivery to the community.
- 6.4 **Split jobs.** Job sharing allows two part-time employees to share a single full-time position. Salary and benefits are usually prorated on the basis of what proportion of the job each person shares. Talent Initiative findings revealed that working parents with small children saw job sharing as a highly attractive option when considering an employment opportunity. Furthermore, a report in Human Resources Executive found that two employees sharing one job are more productive than one employee working full time.
- 6.5 **Be partial.** Consider permanent part-time arrangements that offer anywhere from 20 to 29 hours per week. Such opportunities can give employees—especially those with high levels of family commitment—the ability to decide which days they work and how long they work on those days. Incentives that can help attract employees to this arrangement include prorated health and retiree benefits, equal wages (full and part-time staff earn the same hourly rate), access to training and development programs, and other benefits available to full-time employees.

INCENTIVES

As work-life balance and flexible work options top the list as a key retention strategy, Talent Initiative participants also supported the value of employee incentive programs. According to one participant, “When it comes to perks versus pay, employee perks matter more than you think.”

While Google and Twitter are famous for their over-the-top perks—professionally catered meals, on-site acupuncture, even improv classes—local governments can also achieve positive results by offering reasonable incentives, especially those not offered at other agencies. Research consistently shows that incentives that do not directly impact an employee’s lifestyle and finances are the least coveted. In other words, ping-pong tables in the break room are not as valued as wellness programs, performance pay, or even opportunities for volunteerism. These incentives, along with a sampling of others, are provided below.

Employees want to feel appreciated, and there are a number of low-cost ways to do so. But local governments are cautioned that incentives aren’t “One size fits all,” and many may have only short-term effects on employee morale and retention. Agencies should evaluate their incentives regularly to ensure they’re still attractive to current and potential employees.

Recommendations

- 7.1 **Give bonuses.** As a retention tool, merit pay rewards top talent with additional compensation. It sends a powerful message about what the organization expects from employee performance and contribution; it also sends the message that their hard work is appreciated and important. Merit pay can motivate top talent, as long as the performance factors being monetized matter to the individual and relate to their personal development. Also, in order to remain a motivating tool, the bonus program should not slide into an across-the-board benefit.

7.2 Encourage volunteerism. Today's workforce is charitably-minded and places a high value on giving back. Allowing paid time off for volunteering provides employees with a means to engage and make a difference. It also allows them to indirectly learn soft skills like teamwork, communication, and leadership—all of which can carry over into the workplace as a retention strategy. But the benefit doesn't stop there. Organizations that make volunteering a priority can use this as a recruitment tool, and the positive image it generates reinforces the public service mission of local government.

7.3 Be well. More than ever, employees expect a focus on health and wellness in the workplace. Opportunities like on-site yoga classes, access to city-operated fitness facilities, free gym memberships—even Weight Watchers support groups—can help retain employees seeking healthy lifestyles. A number of Talent Initiative participants reported that these perks are generally low-cost and, in many cases, offered free of charge by an organization's employee assistance program or through health insurance providers. The added benefits to local governments: happier employees, reduced absenteeism, and potentially lower-cost insurance premiums.

7.4 Go casual. Studies have shown that employers can boost morale by allowing employees to wear business casual attire. Many experts believe that if an organization wants to build and retain a team of resourceful and creative employees, it stands to gain from a relaxed dress code. Other cited benefits of business casual attire: employee cost savings from dry cleaning; and the impression that local government employees are more accessible and relatable to the public (as opposed to the "suited-up bureaucrat").

7.5 Give titles. According to a recent study by the Society for Human Resource Management, 63% of professionals would rather get a promotion without a

pay increase than a pay bump without a promotion. The title change recognizes job achievement and enhances a sense of purpose. With a title change, employees can expect to have more responsibilities and more opportunities. While the realities of limited resources, civil service rules, and change-adverse leadership can present barriers, providing employees with promotion-like "working titles"—even creative titles like "Director of Innovation"—will have a tremendous impact on retention.

7.6 Celebrate great. Validation has the power to retain employees and drive up productivity. For example, once a quarter, ask employees for nominations of managers and supervisors who are "great talent developers." Celebrate these managers as organizational role models at a managers' forum, citywide all-hands meeting, or at the honoree's staff meeting.

7.7 Assess competitors. Salary may not be the only reason an employee chooses to stay, but it's still near the top of the list. Organizations that underpay their employees relative to peers may lose their top talent. Every few years, local governments should determine what their competitor agencies are paying and adjust their compensation plan accordingly. This can be done through informal surveys; or more objectively through a formalized compensation study that benchmarks salaries, benefits, performance pay, and other indicators to comparable agencies. Studies should include the comparison of all compensation and benefits—retirement plans, insurance, and other pay—not just salaries. Often, an employee may leave based on these components and not just the salary.

CULTURE

Today's workforce places an emphasis on organizational culture. But for many agencies, it remains a mysterious and "squishy" concept that can mean many different things.

According to Forbes contributor Josh Bersin, culture is, “The set of behaviors, values, artifacts, reward systems and rituals that make up your organization.” One can feel “culture” when they visit or encounter local government because it reflects observable patterns of behavior—from an employee’s enthusiasm to the appearance of an office, to how the organization provides services and responds to inquiries. Ideally, organization culture is defined, nurtured, and protected. But for most organizations, culture casually develops over time as a collection of the beliefs, experiences, and behaviors of its employees—and is heavily influenced by the management team.

Consensus from Talent Initiative participants suggested that local governments must have a positive organizational culture to effectively compete for today’s top talent.

The stereotypical traits of the government workplace—rigid bureaucracy, low energy, fearful of change—are no longer acceptable. Today’s workforce wants to be invested in their work and committed to their employers. If an organization’s culture is undefined or faltering, it is likely that its employees are ready to move on.

Recommendations

8.1 **Acknowledge realities.** Transforming an organizational culture is challenging and often an uphill battle for local governments. Organizational culture is formed over years of interaction among employees, and often echoes a prevailing management style, informal norms, and a set of personnel rules. Nevertheless, actively fostering a specific organizational culture is possible. It requires understanding, time, prioritization, and constant attention. It requires the education and solid support of key officials, e.g., chief executives, department heads, and the governing board.

8.2 **Identify influences.** Before attempting any kind of culture-change initiative, take the time to understand the current culture and the way that things are done. Keep in mind the saying, “Culture eats strategy for breakfast.” In other words, culture is

intrinsically more powerful than an agency’s formal priorities, mission statements, and long-term strategic plans. Culture is not about fancy workspaces and catchy slogans, but rather how employees respond to challenges, interact with each other, make decisions, and define success (i.e., what is celebrated, rewarded, reinforced, or even penalized). When you know what you are, then you can begin to develop into what you want to become.

8.3 **Start conversations.** Positive culture change, requires that management start a conversation with employees. Ask them about the agency’s Employee Value Proposition (EVP), which centers on two key questions:

- Why would a talented professional want to join and stay with us?
- Why would a talented professional be reluctant to join and stay with us?

As part of this conversation, top management can ask if the organization provides opportunities for employees to:

- Express their opinions (and whether those opinions are respected)
- Learn and grow and be challenged
- Interact with senior management
- Work on big meaningful challenges
- Work with some measure of autonomy
- Have the tools and resources needed to do a good job
- Feel supported by others
- Experience flexibility in respect to scheduling

Management must then take action on responses to the conversation and work with all levels of the organization to positively address the issues raised by employees.

8.4 Revisit statements. The public-sector environment is fluid. An organization's mission and vision—along with its guiding values—can become outdated. In the case for defining a new organizational culture, an update of mission and core belief statements can help provide a clear picture of where the organization is, and where the organization wants to go. This type of strategic exercise can articulate the new culture by setting the baseline for future policy decisions, continued organizational transformation, and clear employee expectations.

8.5 Provide support. Management buy-in and employee training are crucial components that allow for successful organizational change. Beyond supporting a new culture, agency leaders must commit to changing their own behaviors and lead by example. As for employees, they need to understand what is expected of them (e.g., a new customer service protocol or an emphasis on cross-department collaboration). An ongoing commitment to training, mentoring, and effective communication is critical as it helps both managers and employees unlearn old behaviors, while instilling new values, expectations, and behaviors.

8.6 Modify systems. Successful organizational change means that employees understand and accept new realities and they can perform better and enjoy greater job satisfaction. This requires that agencies review and amend formal policies and practices to align to the new culture (e.g., training and employee development opportunities; criteria for employee selection, promotions, pay increases; and employee engagement at all levels). If current practice rewards individual performance but the new philosophy requires teamwork, the misalignment can undermine the successful change in culture.

MANAGERS

According to a 2015 Gallup study, 50% of Americans have left their job because of a bad boss. "People leave managers, not companies."

Managers drive so much of one's work experience. They help determine what projects employees work on, who they work with, and when and if they get promoted. They're the person most likely to help employees when they have a problem. However, poor managers can damage the morale, motivation, and productivity of their teams based on their actions—or inaction.

Talent Initiative participants reported that in local government, identifying and removing poor managers is not easy. Some have lost sight of their role; others may simply not have the skills or training to lead their team.

Skilled managers and supervisors are more critical than ever to the success of an organization. This is not because employees can't function without direction, but because managers play a large role in talent management. Good managers and supervisors:

- Set clear expectations
- Provide ongoing feedback
- Ensure that employees have the tools and resources they need
- Remove obstacles
- Ensure that the opinions of employees are heard and taken into account
- Celebrate progress
- Conduct professional development conversations with staff
- Provide learning and growth opportunities
- Maintain a positive outlook and communicate the overall vision, especially when things go sideways

Middle managers (e.g., division managers and program managers) often are not trained or

encouraged to coach their employees. Many mid-level managers do not perceive coaching or developing their staff as a primary responsibility. This has to change. First-line managers have the most daily impact on service delivery and can establish habits that will carry into the future. They can also have the biggest impact on employee retention and satisfaction throughout the organization.

A challenge for organizations is that many managers believe they are stretched too thin and do not have the time or energy to develop themselves or promote the development of others. All managers need to understand that professional development of their employees is a primary job responsibility that must be integrated into how they do their jobs.

Recommendations

- 9.1 Ask questions. Manager training shouldn't be a "One size fits all" approach. Each manager has specific performance issues that need to be addressed—and the best way to know where managers need training is by asking those they supervise. Ensure employee confidentiality in providing candid responses and include questions that require specific examples of areas for improvement or growth. Soliciting this input is crucial for developing manager-specific training plans. Also, executives should ask managers where they think they're the most in need of improvement. Good managers are typically self-aware of their personal limitations and areas for growth.
- 9.2 Consider contracts. Whether part of an employment agreement or incorporated into the annual evaluation form, a training contract gives managers control over what skills or knowledge they should acquire, the classes they plan to attend, and how they are evaluated. Managers must play an active role in developing these contracts so they are empowered to chart their skill development goals. This exercise reinforces a learning culture and provides managers with an opportunity to acknowledge success when they meet critical milestones.
- 9.3 Train soft. While many managers possess technical aptitude, many lack the soft—or "people"—skills to manage people. Today's expectations for managers are essentially those of capacity building instigators—that is, they should provide for a work environment that allows for productivity, positivity, fulfillment, and innovation. Without soft skills—effective communication, delegation, diplomacy, conflict management, even self-awareness—managers will not be equipped to be an effective instrument of progress. Nor will they have the ability to hold their teams together. Incorporate effective supervision and coaching in manager/supervisor evaluations. Public agencies often grade managers and supervisors based on projects accomplished and deadlines met, not how they are supervising staff.
- 9.4 Get personal. As part of its talent management strategy, local governments should consider personality testing and education—especially for its management team. These types of assessments—e.g., Myers-Briggs Type Indicator and DiSC—allow supervisors to understand how different personality types motivate their employees and what makes them successful. This information can help managers develop stronger connections with their team, which can lead to greater engagement and retention.
- 9.5 Prioritize funding. Management training can be a major cost for many organizations, regardless of their size. However, the cost of training is minimal when compared to high turnover costs, lawsuits, or employee grievances.
- 9.6 Review progress. If we promote new supervisors, managers, and directors based on potential, the initial learning curve may be steeper than normal. Take additional care to know which areas require the most growth and ensure they are learning the skills needed to be successful on the job. Establish regular check-ins and ask

questions to review progress. This is especially true for first-time supervisors.

ONBOARDING

According to a recent white paper by accounting firm KPMG, more than 80% of all new hires decide whether or not to stay at their new job within six months of joining. Onboarding helps: nearly 60% of new hires are likely to be with the same organization three years later because of an effective on-boarding process.

The concept of onboarding refers to the process of acclimating employees to their new job and the culture of the organization. It goes beyond the day-long employee orientation of completing paperwork and reviewing workplace policies. It is a comprehensive exercise that extends from the initial job offer to the point when the employee is a contributing asset to the organization.

Effective onboarding includes orientation, training, feedback, and follow-up—a process that could last upwards of a year. A strong onboarding strategy explores the values and mission of the local government organization. It also discusses mutual expectations, equips new hires with the knowledge and resources required to do their job, and allows them to see how they fit into the organization.

Talent Initiative participants overwhelmingly reported a desire for their agency to have an established onboarding program. They understand it helps create loyal and valued employees that can yield significant returns on investment.

Recommendations

10.1 Be impressionable. The time between the offer letter and start date is crucial because new hires may still be interviewing with other agencies. Use this as an opportunity to make a favorable impression by sending a small gift (e.g., a promotional item) or letter from the chief executive, department head, or supervisor welcoming them to the organization. Small gestures like this can make employees feel excited about joining an agency—especially if they have doubts. Such

actions also reinforce the notion that the organization is well-run and has a stake in their future.

- 10.2 Optimize orientation.** Send new hires a welcome packet that contains information about the organization, what they can expect on orientation day, as well as necessary paperwork that needs to be completed immediately—e.g., health insurance and tax forms. Request that the employee completes these materials at home, eliminating the paperwork stack usually handled on the first day. This allows time for more engaging orientation activities that inspire the new employee and help them to acclimate.
- 10.3 Institute a checklist.** Developing an employee orientation checklist is a crucial first step in providing a smooth transition for new employees. Start with the basics—set up their computers, order business cards, show them where the restrooms are—then add items that are unique to your workplace and which need to be communicated. As this tool is developed, test it on new employees and solicit their feedback on items that might have been helpful to know (or to have) in their first days and weeks on the job.
- 10.4 Provide mentors.** Onboarding mentoring programs set new hires “Off on the right foot” by giving them an insight into how their job fits within the overall organization, and how their new role links with their own career goals. A well-selected and well-matched mentor can also provide a candid picture of the new employee’s roles and establish expectations while sharing knowledge and insight for employee success. This dialogue creates a culture of openness. Being selected as a mentor also has a positive impact on that employee’s morale
- 10.5 Connect employees.** Joining a new organization may be a difficult experience for many. Pairing a new employee with a peer “buddy” who is not in the employee’s

immediate workgroup can help the employee understand and adapt to the organization's culture.

- 10.6 **Go long.** The onboarding process should be a one-year journey for the employee. It takes time for employees to understand job-specific nuances, adjust to a new organizational culture, and learn work-related technologies. Agencies, if they haven't already, should outline milestones to ensure that new hires are assimilating as expected and continuing to increase productivity. The onboarding process should also include opportunities to forge relationships with other employees, and monthly employee check-ins with human resources personnel or their mentor to ensure a path to success.

SKILLS

While onboarding teaches new employees the skills and knowledge they need before setting out on their own, Talent Initiative participants stressed the importance of ongoing training programs. Without this resource, employees are often left to navigate a system of informal learning and development tactics through job shadowing and tribal knowledge sharing.

Talent Initiative findings support research from the Society for Human Resource Management that employers care more about employee soft skills than they do technical abilities. One key reason is that they help facilitate human connections, which is important in a service-oriented business like local government. Employees with effective soft skills build relationships with internal teams, work well with elected officials, and effectively serve the general public.

This is not to say that technical skills aren't important. They are. But in a comparative sense, training a new employee for a particular hard skill—like how to use a computer program—is easier to do than training an employee a critical soft skill—like patience—to learn the program. Talent Initiative participants stressed the connection of ongoing training to talent retention.

Recommendations

- 11.1 **Teach writing.** "Writing skills are a silver bullet," reported one Talent Initiative participant. Strong writing advances all aspects of local government—from effective problem solving and analysis, to teamwork and leadership. Public-sector jobs require a substantial amount of written communication. Investing in strong written communication skills will save time and improve results daily. It can boost confidence, open the door to promotions, and help employees convey information—whether in a staff report or email—succinctly, persuasively, and effectively.

- 11.2 **Hone communication.** Government employees interact with a number of audiences: peers, external colleagues, elected officials, and the general public. Today's emerging talent benefits from learning techniques on effective presentations, public speaking, minimizing nervousness, and addressing conflict. Many Talent Initiative participants recommended the training resources of CAPIO and MMANC/SC. Hosting a local Toastmasters Club was also cited as best practice for communication and leadership skills development.

- 11.3 **Build astuteness.** While many in today's emerging workforce have professional degrees, many of them lack political savvy and an understanding of local government challenges. And the reality is, most of this is learned on the job. Offering aspiring leaders opportunities to attend community and governing board meetings, assist in writing and developing presentations, and taking on policy-related projects are great ways to expose them to government inner workings. They can take advantage of programs offered by the LCC, ICMA, CSMFO, and other professional organizations to learn more about current legislation and fiscal trends that can affect local government.

- 11.4 **Train critically.** In addition to the "soft" skills of effective communication, political

savvy and other interpersonal skills. Critical thinking is important for success. Skills enable employees to weigh the pros and cons of solutions to problems before choosing a way forward; they also equip them with the tools and approaches to logically structure recommendations before making a final decision.

- 11.5 **Map talent.** Talent mapping is a technique commonly used in the United Kingdom and Canada to document information about key staff and the skills required to support organizational changes ahead. It asks questions about where an agency wants to be short- and long-term, and what skills are needed to get there. This exercise helps leaders project future human resource needs, and devise training paths and leadership development programs to grow employees to become tomorrow's workforce. It also allows local governments to create a roadmap for succession planning and future recruiting efforts.
- 11.6 **Budget it.** While most governments know that investing in talent means increased productivity and employee loyalty, many don't make it a funding priority. According to the Association for Talent Development, organizations should provide at least 40 hours of training annually for each employee with total employee development costs at 4.3% of payroll. This sets a goal moving forward. The support of elected officials and the inclusion of employee development programs into policy documents (like an organization's strategic plan) is critical for making it a reality.
- 11.7 **Take a bite.** Use interim and temporary assignments to provide stretch opportunities for employees. It gives the organization a chance to test employees and lets employees hone their skills.

ASSESSMENT

A talented and skilled workforce is the lifeblood of every organization. As the battle for talent escalates, local governments need to make

ongoing assessment a key component of its employee retention strategy. This includes ongoing evaluation of comparative data from professional organizations; the performance review process; and regular employee interviews that seek to understand personal and professional goals.

Recommendations

- 12.1 **Research trends.** Keep up-to-date on what is happening in the industry by attending conferences. Membership in professional associations can shed light on primary drivers of turnover; they can also highlight retention strategies and technologies that other agencies are using and finding effective. Benchmarking surveys are also useful, as they can provide data on where an organization stands on issues like pay, benefits, and perks.
- 12.2 **Rethink reviews.** More and more, corporate America is doing away with annual performance reviews. The reasons are many, from the stress they cause to the amount of time they take. Annual reviews are seen as a system that looks at past practices, as opposed to today's need for daily performance management. Providing instead for more frequent manager-employee check-ins—quarterly, monthly or even weekly—encourages more meaningful conversations in which accomplishments are recognized and developmental areas are discussed. This ongoing dialogue also allows for fresh and relevant feedback, more real-time information, and increased employee engagement.
- 12.3 **Identify flight paths.** Employees, regardless of age, want to know “where they stand.” With proper training, experience, and education, is there a path to advancement within the organization? Is that in the next year, three years, or five years? When employees have a clear idea that there are advancement opportunities within the agency and understand what it will take to get there, they are more likely to stay and grow with the organization.

- 12.4 **Go 360°.** Local government performance reviews are usually based on a single perspective. Shifting this practice to a 360° model provides for performance feedback that is solicited from all directions in the organization, i.e., peers and direct reports that can add insight into how well the employee is working with their team. This feedback provides a balanced view of the skills and contributions an employee makes to the organization, as well as to their impact on furthering collective organizational goals. It also allows managers to evaluate the input from many sources to note similarities and trends, and identify areas that may need additional support.
- 12.5 **Self assess.** Asking an employee to evaluate his or her own performance can be extremely effective. Employees are often more critical of their performance than managers. It can also help initiate dialogue, encourage personal growth, and result in greater employee accountability.
- 12.6 **Say stay.** A stay interview is a retention strategy that engages employees. Effective stay interviews ask employees why they want to continue working for the agency—and what might make them leave—using structured questions and an open dialogue. Experts recommend doing them at least once a year. This may increase to at least twice a year for positions where there is a high rate of turnover.
- 12.7 **Ask after.** A common private-sector practice is to conduct post-exit interviews two weeks to three months after an employee leaves a position. Research suggests that this additional time can improve interview answers by up to 50%. Once removed from the emotion of leaving a job, former employees offer more constructive feedback. A former employee may now treat this opportunity as an advisor, knowing the agency is taking steps to learn and improve its organizational culture.



ENGAGING ELECTED OFFICIALS

Elected Officials are often overlooked in talent management efforts, when, in fact, they are essential participants. They are the public face of the organization's culture and establish funding for programs and services, including employee training and development.

Human resources (HR) is an internal management function that is not always shared with policymakers. Typically, the only times elected officials are exposed to HR matters are during the budget process, labor negotiations, or a closed-session when things have gone terribly wrong.

Policy-makers often lack information on workforce trends and challenges that would benefit from their support (e.g., difficulty recruiting for certain classifications, turnover rates, retirement projections). Consider looking for ways to include workforce information in regular reports to the legislative body. During the budget process, rather than strictly discussing personnel in terms of numbers, share a story about the profession's challenges to actively recruit and keep good talent. Look for ways to celebrate employee achievements at public meetings.

“Elected officials need to understand that their goals are reliant upon the talent within the organization.”

Focus group participants recommended more sharing of data with policy-makers. This includes information associated with the organization's workforce analysis (which may highlight an agency's vulnerability to baby-boomer retirements or the loss of talent), maps of where employees live and commute time data, the costs of losing talent, as well as the results of employee engagement surveys.

Recommendations

13.1 **Invite feedback.** Pose two simple questions to your elected officials: why would a talented professional want to join and stay with us? and why would a talented professional be reluctant to join and stay with us? Inviting input from elected officials may result in a conversation that can support your

agency's efforts on recruitment, changes to personnel policies, labor negotiations, compensation analysis, and organizational culture. Does your elected body see themselves as a positive aspect of your employee value proposition (creating a supportive environment and culture of appreciation)? Or do they recognize how they may adversely impact recruitment efforts (dysfunctional councils that create a negative environment)?

13.2 **Discuss trends.** As part of budget discussions, take a few minutes to highlight your efforts on recruitment and retention. Share what's working and what can be improved. If you're making personnel cuts, explain how you may explore flexible work schedules or improved organizational culture as a way to mitigate a reduction in employee morale. If you have planned retirements in the upcoming budget period, share your strategies on how to recruit for the positions or build your talent pipeline.

13.3 **Consider updates.** One of the biggest obstacles reported by Talent Initiative participants was the existence of outdated civil service rules that hinder an agency's ability to promote good talent or provide employees with temporary or interim promotional assignments. Reviewing personnel policies and outdated rules with elected officials and bargaining units (if appropriate) may help all parties understand how antiquated rules can effect leadership development and retention efforts.

13.4 **Reinforce civility.** The behavior of elected officials on the dais does not go unnoticed by the public or the media. Elected officials may not realize that their behavior is directly attributable to an employee's willingness to join or stay in an organization. In a dysfunctional political environment, employees at the management level may cope and continue with their work, but may be reluctant to take the next step. Facilitated workshops

and study sessions may be an appropriate venue to discuss civility and its impact on recruitment and retention.

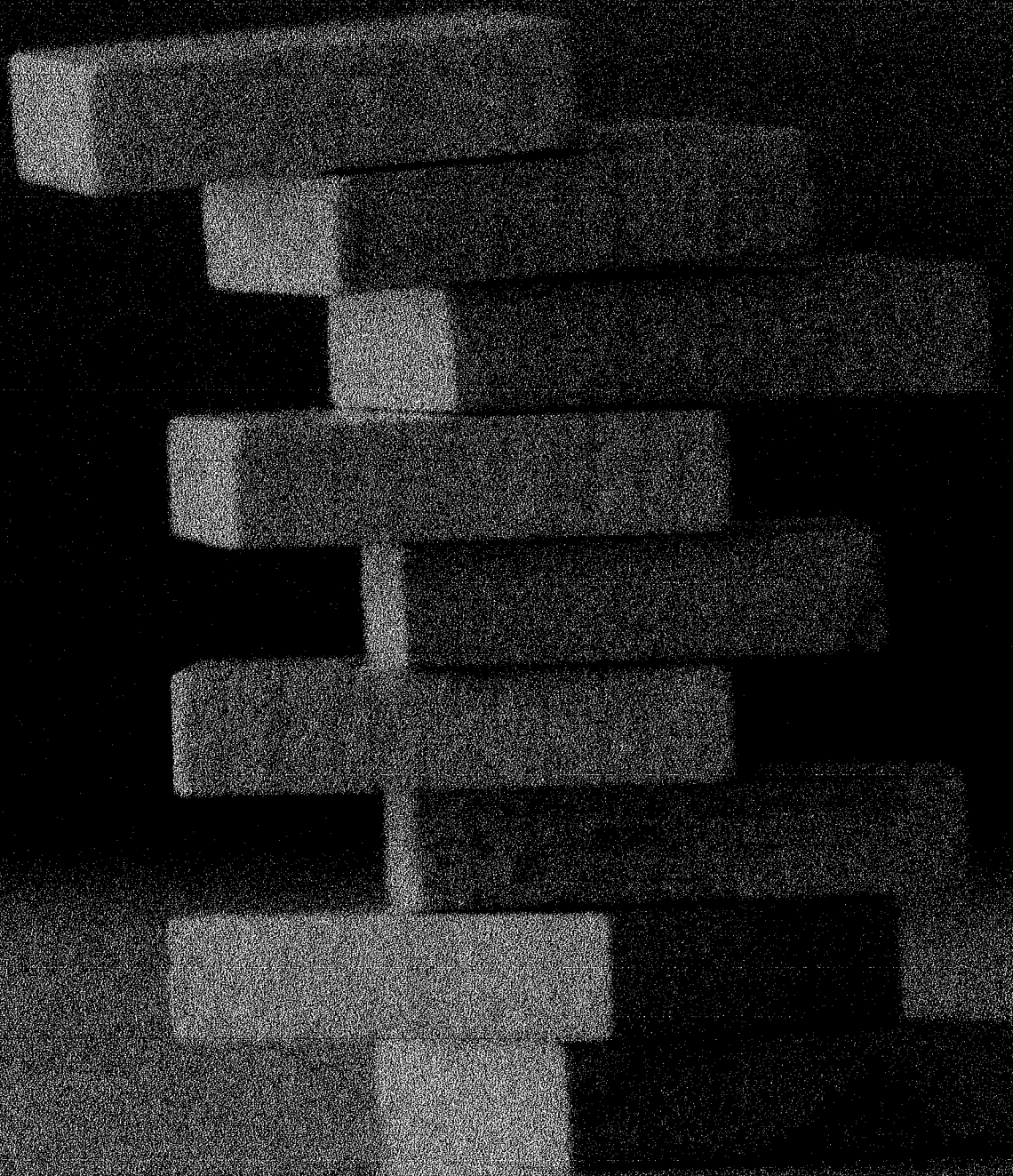
- 13.5 **Stretch safely.** In some organizations, department heads or division managers are the only staff members permitted to deliver staff reports or presentations to elected officials. This is a missed opportunity to coach and guide the leadership pipeline on how to effectively deliver presentations and develop other soft skills. With coaching and guidance, staff can “stretch safely.” An added benefit: elected officials can see how your agency is developing the talent pipeline.
- 13.6 **Defend staff.** Executives and elected officials alike need to support local government employees by responding directly to abusive comments and attacks on staff. Many Talent Initiative participants reported how much employees appreciate the presiding officer (e.g., mayor, president of the board) or chief executive publicly defending staff when being attacked publicly.
- 13.7 **Support development.** Many agencies reported that training and development is one of the first expenditure categories to be cut during budget reductions. Elected officials should be reminded that staff development helps foster employee engagement and productivity, and simply keeping staff on payroll without training is not an effective way to build a dynamic workforce for the community.
- 13.8 **Manage expectations.** While it may be necessary to hold evening or weekend meetings for the convenience of the public, elected officials need to be mindful of how excessive after- hours meetings can have an impact on employees’ work-life balance and morale. Limiting the number of special council, board, committee, or commission meetings may help. Set an expectation with elected officials that staff should not be contacted on weekends or after hours unless in an emergency (and set an

expectation with staff that they are not to respond to elected officials after-hours unless there is an emergency).

- 13.9 **Foster appreciation.** Managers can create a “culture of appreciation” among staff and the elected body by acknowledging staff for a job well done. Specific acknowledgment of team members following staff reports or presentations can help showcase the hard work that is being done. Inviting the city council and commissioners to an annual employee recognition luncheon can help showcase appreciation in action.

TAKING ACTION

"A journey of a thousand miles starts with a single step."
- Laozi, Chinese Philosopher



TEN IDEAS TO IMPLEMENT TODAY

This Talent Initiative report provides a menu of diverse recommendations for local government executives. Leaders can start anywhere they'd like in implementing any or all of the recommendations in this report to better attract, retain, and grow talent.

Here are ten ideas to consider in beginning your efforts:

1. Conduct a simple workforce analysis (i.e., showing retirement risk now and in five years for different employee groups).
2. Eliminate minimum qualifications for entry-level positions; hire for potential or learning agility.
3. Enhance job announcements to showcase the meaning and purpose of the work, organizational values and culture, and opportunities to grow and develop.
4. Fully utilize "stretch" assignments, including participation on cross-functional project teams.
5. Train all supervisors and managers on how to coach and conduct development conversations with all direct reports.
6. Ensure that supervisors and managers provide ongoing performance feedback to employees, not just a once-a-year performance evaluation.
7. Conduct "stay interviews" with key talent (or better yet with all employees).
8. Hire one or several university interns and limited-term Management Fellows (those graduating with master's degrees).
9. Incorporate more flexibility into scheduling including, where appropriate, telecommuting.
10. Ensure ongoing face-to-face interaction between employees and top management.

Bonus Idea: Start a conversation with all employees about enhancing organizational culture (and then do something!).

A CALL TO ACTION

Talent Initiative research suggests that agencies are losing the battle for talent. We need to act now if our organizations are to remain competitive in the face of the challenges impacting our communities.

We encourage you to take the following steps now:

- Discuss this report's Executive Summary with your executive team.
- Start a conversation with key employees regarding your agency's Employee Value Proposition. Ask three questions:
 - Why would a talented professional want to join us and stay with us?
 - Why would a talented professional be reluctant to join us and stay with us?
 - What can we all do to enhance our Employee Value Proposition?
- Conduct a study session or other conversation with the governing board about your Employee Value Proposition; engage governing board members in helping top management address talent challenges.
- Implement a few ideas from the Ten Ideas to Implement Today section of this report.

Start your journey to becoming an Employer of Choice!