

Human Resources

Fund 10 • Directorate 02 • Division 30 • Department 304

Program Description

The Human Resources function encompasses several programs and services designed to support the District and its employees and volunteers in the achievement of its mission and objectives. Human Resources oversees areas pertaining to the people, personnel practices, and leadership aspects of the District. Included in these areas are staffing, performance management, salary administration, integrated talent management, workers' compensation, light duty, employee relations (including labor relations), Civil Service, personnel policy maintenance, and other areas essential to the management of the District's human resources.

Budget Summary

	2011-12 Actual	2012-13 Actual	2013-14 Revised Budget	2014-15 Budget
Expenditures				
Personnel Services	\$ 787,799	\$ 820,427	\$ 982,546	\$ 1,053,079
Materials and Services	68,530	68,983	144,135	123,599
Total Expenditures	\$ 856,329	\$ 889,410	\$ 1,126,681	\$ 1,176,678

Personnel Summary

Position	2011-12 Actual	2012-13 Actual	2013-14 Revised Budget	2014-15 Budget
Human Resources Director	1.00	1.00	1.00	1.00
Human Resources Manager	1.00	1.00	1.00	1.00
Sr. Benefits Administrator	1.00	1.00	1.00	1.00
Human Resources Data Analyst	1.00	1.00	1.00	1.00
Sr. Employment Coordinator	1.00	1.00	1.00	1.00
Human Resources Generalist	0.00	0.00	1.00	1.00
Human Resources Assistant	1.00	1.00	1.00	1.00
Total Full-Time Equivalents (FTE)	6.00	6.00	7.00	7.00

2014-15 Significant Changes

The increase in Personnel Services results from the full year budget for the new HR Generalist position added April 1, 2014, offset in part by non-recurring retirement payments of accrued benefits for the prior Director. Union overtime in 5120 provides for relief shift funding for line positions during investigation leaves in the amount of \$10,000; an additional amount of \$13,144 for Strategic Goal V Committee work and outreach efforts; \$6,800 in overtime associated with the Integrated Talent Management program; and \$1,272 for non-Civil Service hiring processes.

Within Materials and Services, account 5410, General Legal, for \$10,000; and account 5411, Collective Bargaining, \$15,000 are budgeted for ongoing labor and employment issues. Other Professional Services for \$47,210, reflects \$10,000 for a consultant to help develop a strategic multi-year outreach plan to broaden the District's diversity; \$25,160 for leadership and management assessment, development, and training; \$9,200 for drug and alcohol testing for pre-employment, and fees for background checks; and other matters, including HR consulting services for \$3,000. Account 5417, Temporary Services, was reduced reflecting the addition of department staff in 2013-14.

Human Resources, continued

2014-15 Significant Changes, continued

Account 5472 includes funding of \$6,000 for retirement recognition and \$6,000 for the Meritorious Awards Ceremony, in addition to Employee of the Quarter recognition and Length of Service Awards. Account 5461, External Training, for \$11,683, including \$7,394 for web-based supervisor training. Account 5570, Miscellaneous Expenses, includes \$2,925 for job fair entry and sponsorship fees, and \$1,100 for awards and promotional ceremonies among other items.

Status of 2013-14 Service Measures

- Gather data on injured workers who return to light duty and submit to SAIF for reimbursement.

Goal(s)/Call(s) for Action: VII
Service Type(s): Essential
Measured By: Periodic review and submission of injured worker/light duty data to SAIF in order to qualify for reimbursement.
Status or Outcome: \$19,888 collected in Employee-At-Injury Program (EAIP) funds since July 1, 2013.

- Successfully attract, select, retain, and promote qualified personnel for all District positions. An anticipated higher volume of employment activity during the fiscal year creates a need for additional and temporary staff resources in HR to support the employment function during peak periods.

Goal(s)/Call(s) for Action: VI
Service Type(s): Mandatory
Measured By: The data collected in the hiring manager satisfaction survey ratings completed after each selection process (non-Civil Service), the low rate of voluntary turnover, analysis of exit interview feedback, and overall success in trial service of personnel newly hired or newly promoted; all reflect overall success in employment actions.
Status or Outcome: Hiring manager satisfaction ratings continue to be very high, voluntary turnover remains very low, and the District continues to have new hires successfully complete trial service periods.

- Ongoing analysis of positions to ensure jobs are appropriately classified within the District's salary structure.

Goal(s)/Call(s) for Action: VI
Service Type(s): Essential
Measured By: Ongoing review of new and existing positions in order to ensure that the correct work is being performed for any given position, and that positions are correctly placed in the District's salary structure as compared to both the external market and other positions internal to the organization.
Status or Outcome: Position and reclassification analysis were performed throughout the year, resulting in some salary grade and pay adjustments. The District continues to participate in two formal salary surveys to ensure classifications are appropriately graded in the salary structure.

Status of 2013-14 Service Measures, continued

- Administration of the annual performance evaluation process to include written appraisals, as well as ongoing feedback to employees in regard to their work performance.

Goal(s)/Call(s) for Action: VI/2, 5, and 7
Service Type(s): Essential
Measured By: 100% compliance for all employees to receive a written performance evaluation annually on July 1st, delivered during a face-to-face meeting with the employee's manager. Additionally, new or promoted employees will receive a minimum of three written quarterly evaluations prior to the annual evaluation, each delivered in a meeting with the employee in order to discuss both positive and negative feedback.

Status or Outcome: The Human Resources Division continues to invest significant effort toward supporting compliance and quality of performance evaluations. For non-line employees, 100% compliance was achieved for this performance cycle. Performance evaluations were completed for 98% of the line employees. Compliance with quarterly trial service evaluations remains less than 100%.

- Process personnel actions with 100% accuracy, with actions entered into Munis reflecting intentions of authorizing manager.

Goal(s)/Call(s) for Action: VI
Service Type(s): Mandatory
Measured By: No payroll or benefits errors as a result of processing personnel actions and data entry into Munis each payroll cycle.

Status or Outcome: The Human Resources Division has continued to identify effective auditing protocols to minimize the risk of errors in processing personnel actions.

- Coordinate employee recognition programs that support employee engagement and relationship building.

Goal(s)/Call(s) for Action: IV, VI
Service Type(s): Essential
Measured By: Successful coordination of key recognition events, including the annual Meritorious Awards Ceremony, Employee-of-the-Quarter, and promotional ceremonies; and other all personnel events that support relationship building among employees and volunteers (e.g., summer all-staff picnic).

Status or Outcome: Employee recognition events were successfully coordinated and attendance was strong. Employees participated in the following events: 24 employees were recognized at several promotion ceremonies; 34 Employee-of-the-Quarter nominations were received and five employees were given awards; 75 employees attended the annual family barbeque and potluck at the park; over 100 employees attended and participated in the biennial District Day event; and 40 employees were recognized at the annual Meritorious Awards and Recognition Ceremony.

Human Resources, continued

Status of 2013-14 Service Measures, continued

- Implement the Human Resource side of a current labor contract. Interpret and adapt policies and procedures that reflect the current contract language.

Goal(s)/Call(s) for Action: VI/6
Service Type(s): Essential
Measured By: All terms of employment addressed in the collective bargaining agreement are consistent with policies and procedures for affected employees.
Status or Outcome: Human Resources is implementing changes associated with the labor contract effective July 1, 2012 through June 30, 2015. This includes updating salary schedules, administering the lump sum payment, and updating seniority schedules.

Status of 2013-14 Change Strategies

- Support the development and implementation of a multi-year diversity plan, complete with benchmarks, staff resources, and needs analysis. Include cost and budget impact.

Goal(s)/Call(s) for Action: V/A, B, C, 1, 2, and 3
Budget Impact: Could be significant based on recommendations of steering committee
Duration: Year 4 of 5
Budget Description: In order to develop and enhance a workforce that understands and respects individual and group differences, the District will continue to work toward increasing employee awareness of the benefits of a diverse workforce, increase overall cultural competency in order to more effectively serve the citizens of the District, and increase organizational diversity to reflect the communities served.
Partner(s): Integrated Operations, Division Managers, Assistant Chiefs, Fire Chief's Office
Status or Outcome: The Goal V Taskforce, led by the Fire Chief's Office, made some progress in identifying a comprehensive strategy for diversity work, aided by an employee survey developed and administered by a third party. The taskforce also identified the framework for staffing the significant coordination function that will be required in moving from strategy to execution.



Status of 2013-14 Change Strategies

- Develop the framework for an integrated talent management system that aligns all HR functions (job descriptions, employee selection, professional development, performance evaluations, and succession planning) with one another and connects business objectives to talent management strategies, outcomes, and Calls to Action.

Goal(s)/Call(s) for Action:	VI/C, D, and 7
Budget Impact:	Significant budget impact related to costs associated with project team member participation, staff training, materials, and assessment tools.
Duration:	Year 3 of 5
Budget Description:	The foundation of this framework is the development of a competency model for the organization, described above.
Partner(s):	All organizational units
Status or Outcome:	Executive staff approved a charter for a team of individuals to develop a sustainable integrated talent management (ITM) framework. Led by a member of the Human Resources Division, a team of ten individuals from all sectors of the workforce met periodically to further define the scope of the initiative, while developing structures to support short-term and long-term talent development. Deliverables included: <ul style="list-style-type: none">• The development of a framework to conduct competency modeling for every job in the organization.• The identification of core competencies for the organization, approved by Executive Staff.• The identification of competencies associated with different job families, including management positions and executive leadership positions.• The development of two trainings that support individual professional development planning—one for individual employees and the other for supervisors.• Deployment of several formal assessment tools used to identify employees with high potential for leadership roles and to provide developmental feedback to individuals.• Continued training of supervisors on year-round performance management and goal setting, tying individual performance to department and organizational strategic goals.• Identification of a framework for conducting effective succession planning discussions with Executive Staff.

Status of 2013-14 Change Strategies

- Develop a sustainable supervisor/manager/leadership training program for line and non-line employees.

Goal(s)/Call(s) for Action:	VI/C and D
Budget Impact:	Budget as necessary for delivery of an ongoing training program focused on development of employees as supervisors and managers.
Duration:	Year 3 of 3
Budget Description:	The Harvard ManageMentor® program has proven to be an effective vehicle for supervisory training. A pilot group has completed an initial set of learning modules. Next fiscal year, this same group will complete an additional six modules, while a second group will begin on an initial set.
Partner(s):	Training, Integrated Operations, Fire Chief's Office
Status or Outcome:	The pilot group began a second set of learning modules over the fiscal year, while a second group of managers began an initial set of learning modules using the same format of independent course review, followed by a group debrief of each module's material. Between both groups, a total of 41 managers are actively participating in the program.

Human Resources, continued

Additional 2013-14 Accomplishments

- The Human Resources team successfully transitioned to a new HR Director following the November 2013 retirement of the previous HR Director.
- Successfully implemented the new \$500 Flexible Spending Account carryover provision on January 1, 2014.
- Successfully launched an employee emergency planning and contact information effort in the event of a line of duty death or serious injury. As part of the initiative, Employee Self-Serve, in the District's financial and human resources management system, was enhanced to allow more robust maintenance of emergency contact information.
- Created a Battalion Chief Kelly Day schedule to facilitate analysis of adding a floating Battalion Chief to cover Kelly Day shifts to more effectively manage resources.
- Successfully initiated and implemented supervisor training for new non-Union managers and supervisors. Training will be delivered at least once annually. Additional classes will be provided as needed.

2014-15 Service Measures

	2010-11 Actual	2011-12 Actual	2012-13 Actual	2013-14 Estimated	2014-15 Projected
HR FTE	6.0	6.0	6.0	6.0	7
Total number of employees	441	447	452	463	468
Union	328	330	340	349	353
Non-Union	113	117	112	114	115
Total number of volunteers	56	58	52	57	57
Number of employees hired	34	20	24	26	26
Volunteers onboarded	13	11	15	15	15
Number of employee separations	8	5	6	7	6
Number of volunteer separations	23	9	21	10	15
Number of employee retirements	12	9	14	8	15
Average number of Union employees on STD (short term disability) per week	4.9	3.3	2.3	2.0	2.0
Average duration of weeks on STD per employee	11.1	10.1	12.5	12.0	12.0
Average weekly number of line personnel off-duty for injury or illness both work and non-work related	13.4	10.2	5.4	5.0	5.0
Number of selection processes completed (Total)	21	17	28	40	40
Civil Service	9	6	19	15	18
Non-Civil Service	12	11	9	25	22
Turnover (<i>not including retirements</i>)	1.9%	.9%	1.6%	1.7%	1.7%
Turnover (<i>including retirements</i>)	4.6%	2.7%	4.7%	3.3%	4.0%
Number of applications processed*	573	473	605	500	400*

*Beginning in fiscal year 2014-15, this service measure will be limited to non-Civil Service positions (applications for Civil Service positions will be tracked separately in the 10110 budget).

2014-15 Service Measures, continued

- Gather data on injured workers who return to light duty and submit to SAIF for reimbursement.

Goal(s)/Call(s) for Action: IV/1
Service Type(s): Essential
Measured By: Periodic review and submission of injured worker/light duty data to SAIF in order to qualify for reimbursement.

- Successfully attract, select, retain, and promote qualified personnel for all District positions. It is anticipated that the higher volume of employment activity experienced during the current fiscal year will continue at the same level, driving the need for additional resources in HR to support the employment function. The quality of the staffing outcomes remains critical to the success of the District.

Goal(s)/Call(s) for Action: VII/F
Service Type(s): Mandatory
Measured By: The data collected in the hiring manager satisfaction survey ratings completed after each selection process (non-Civil Service), the low rate of voluntary turnover, analysis of exit interview feedback, and overall success in trial service of personnel newly hired or newly promoted; all reflect overall success in employment actions.

- Ongoing analysis of positions to ensure jobs are appropriately described and classified within the District's salary structure. Job descriptions serve as the anchor for recruitment and selection, performance management, and learning and development.

Goal(s)/Call(s) for Action: VII
Service Type(s): Essential
Measured By: Ongoing review of new and existing positions in order to ensure that the correct work is being performed for any given position, and that positions are correctly placed in the District's salary structure as compared to both the external market and other positions internal to the organization.

- Administration of the annual performance evaluation process to include written appraisals, as well as ongoing feedback to employees in regard to their work performance.

Goal(s)/Call(s) for Action: VII/4
Service Type(s): Essential
Measured By: 100% compliance for all employees to receive a written performance evaluation annually on July 1st, delivered during a face-to-face meeting with the employee's manager. Additionally, new or promoted employees will receive a minimum of three written quarterly evaluations prior to the annual evaluation, each delivered in a meeting with the employee in order to discuss both positive and negative feedback.

- Accurately process personnel actions, with actions entered into Munis reflecting intentions of the authorizing manager.

Goal(s)/Call(s) for Action: VII
Service Type(s): Mandatory
Measured By: The number of payroll or benefits transactions entered accurately reflecting the intentions of the authorizing manager.

Human Resources, continued

2014-15 Service Measures, continued

- Coordinate employee recognition programs that support employee engagement and relationship building.

Goal(s)/Call(s) for Action: IV
Service Type(s): Essential
Measured By: Successful coordination of key recognition events, including the annual Meritorious Awards Ceremony, Employee-of-the-Quarter, promotional ceremonies, and other all personnel events that support relationship building among employees and volunteers (e.g., summer all-staff picnic).

- Implement the Human Resource side of the current labor contract. Interpret and adapt policies and procedures that reflect the current contract language.

Goal(s)/Call(s) for Action: VII/2
Service Type(s): Essential
Measured By: All terms of employment addressed in the collective bargaining agreement are consistent with policies and procedures for affected employees.

2014-15 Change Strategies

- Support the development and implementation of a multi-year diversity plan, complete with benchmarks, staff resources, and needs analysis. Include cost and budget impact.

Goal(s)/Call(s) for Action: V/A, B, C, 1, 2, 3, and 4
Budget Impact: Could be significant based on recommendations of steering committee
Duration: Year 5 of 5
Budget Description: In order to develop and enhance a workforce that understands and respects individual and group differences, the District will continue to work toward increasing employee awareness of the benefits of a diverse workforce, increase overall cultural competency in order to more effectively serve the citizens of the District, and increase organizational diversity to reflect the communities served.
Partner(s): Integrated Operations, Division Managers, Assistant Chiefs, Fire Chief's Office

- Develop the framework for an integrated talent management system that aligns all HR functions (job descriptions, employee selection, professional development, performance evaluations, and succession planning) with one another and connects business objectives to talent management strategies, outcomes, and Calls to Action.

Goal(s)/Call(s) for Action: VII/F, 3, and 4
Budget Impact: Significant budget impact related to costs associated with project team leadership and member participation, staff training, materials, assessment tools, and software.
Duration: Year 4 of 5
Budget Description: The objective of this integrative approach to HR functions is talent assets that drive business outcomes and sustain the business. Competencies serve as the currency of the approach and provide the foundation of integration.
Partner(s): All organizational units

Human Resources, continued

	Actual Prior FY 2012	Actual Prior FY 2013	Budget Prior FY 2014	Budget Proposed FY 2015	Budget Approved FY 2015	Budget Adopted FY 2015
10304 General Fund						
5002 Salaries & Wages Nonunion	\$ 426,262	\$ 457,205	\$ 472,414	\$ 543,523	\$ 543,523	\$ 543,523
5004 Vacation Taken Nonunion	29,947	26,322	36,343	41,814	41,814	41,814
5006 Sick Taken Nonunion	13,906	7,210	7,271	8,364	8,364	8,364
5008 Personal Leave Taken Nonunion	1,667	465	3,118	3,587	3,587	3,587
5010 Comp Taken Nonunion	1,286	1,718				
5015 Vacation Sold	9,338	8,014	9,835	14,358	14,358	14,358
5016 Vacation Sold at Retirement			39,241			
5021 Deferred Comp Match Nonunion	15,948	19,640	23,494	29,866	29,866	29,866
5102 Duty Chief Relief	1,519					
5120 Overtime Union	12,176	5,806	30,686	31,216	31,216	31,216
5121 Overtime Nonunion	45	331	750	750	750	750
5201 PERS Taxes	97,519	99,249	134,650	135,819	135,819	135,819
5203 FICA/MEDI	35,765	36,561	48,002	52,058	52,058	52,058
5206 Worker's Comp	12,849	7,901	11,295	12,248	12,248	12,248
5207 TriMet/Wilsonville Tax	3,428	3,513	4,483	4,997	4,997	4,997
5208 OR Worker's Benefit Fund Tax	154	168	283	313	313	313
5211 Medical Ins Nonunion	82,307	86,802	96,059	108,715	108,715	108,715
5221 Post Retire Ins Nonunion	5,250	5,483	5,625	6,300	6,300	6,300
5230 Dental Ins Nonunion	10,947	11,431	12,794	14,299	14,299	14,299
5240 Life/Disability Insurance	4,493	4,697	7,083	8,012	8,012	8,012
5250 Unemployment Insurance	6,793	19,619	18,000	18,000	18,000	18,000
5260 Employee Assist Insurance	10,440	11,583	11,880	11,880	11,880	11,880
5290 Employee Tuition Reimburse			2,280			
5295 Vehicle/Cell Allowance	5,760	6,710	6,960	6,960	6,960	6,960
Total Personnel Services	787,799	820,427	982,546	1,053,079	1,053,079	1,053,079
5300 Office Supplies	176	236	700	700	700	700
5301 Special Department Supplies	135	139	500	500	500	500
5302 Training Supplies	265	2,612	4,370	2,750	2,750	2,750
5367 M&R Office Equip	2,517	2,301	2,496	2,520	2,520	2,520
5410 General Legal		10,460	10,000	10,000	10,000	10,000
5411 Collective Bargaining	15,186	2,791	15,000	15,000	15,000	15,000
5414 Other Professional Services	12,867	17,981	50,455	47,210	47,210	47,210
5415 Printing	184	874	450	400	400	400
5417 Temporary Services		4,478	11,700			
5461 External Training	14,268	8,210	13,744	11,683	11,683	11,683
5462 Travel and Per Diem	3,677	3,958	5,350	4,700	4,700	4,700
5472 Employee Recog & Awards	11,396	8,201	16,840	14,600	14,600	14,600
5484 Postage UPS & Shipping	6	30	100	100	100	100
5500 Dues & Subscriptions	2,622	2,985	3,500	3,531	3,531	3,531
5570 Misc Business Exp	4,793	2,898	6,530	4,505	4,505	4,505
5571 Planning Retreat Expense		145	400	400	400	400
5572 Advertis/Public Notice	440	684	2,000	5,000	5,000	5,000
Total Materials & Services	68,530	68,983	144,135	123,599	123,599	123,599
Total General Fund	\$ 856,329	\$ 889,410	\$ 1,126,681	\$ 1,176,678	\$ 1,176,678	\$ 1,176,678

