

## 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

| Expenditures              | 2016-17<br>Actual   | 2017-18<br>Actual   | 2018-19<br>Adopted<br>Budget | 2019-20<br>Adopted<br>Budget |
|---------------------------|---------------------|---------------------|------------------------------|------------------------------|
| Personnel Services        | \$ 1,121,511        | \$ 1,235,908        | \$ 1,357,801                 | \$ 1,488,321                 |
| Materials and Services    | 103,573             | 99,885              | 231,869                      | 287,199                      |
| <b>Total Expenditures</b> | <b>\$ 1,225,084</b> | <b>\$ 1,335,793</b> | <b>\$ 1,589,670</b>          | <b>\$ 1,775,520</b>          |

## Personnel Summary

| Position                                 | 2016-17<br>Actual | 2017-18<br>Actual | 2018-19<br>Budget | 2019-20<br>Budget |
|--|-------------------|-------------------|-------------------|-------------------|
| Director of Organizational Health        | 1.00              | 1.00              | 1.00              | 1.00              |
| Human Resources Manager                  | 1.00              | 2.00              | 2.00              | 2.00              |
| Senior Benefits Administrator            | 1.00              | 1.00              |                   |                   |
| Senior HRIS Analyst                      | 1.00              | 1.00              | 1.00              | 1.00              |
| Employment Recruiter                     | 1.00              | 1.00              | 1.00              | 1.00              |
| Human Resources Generalist               | 2.00              | 1.00              | 1.00              | 1.00              |
| Human Resources Specialist               | 1.00              | 1.00              | 1.00              | 1.00              |
| Administrative Assistant                 |                   |                   | 1.00              | 1.00              |
| <b>Total Full-Time Equivalents (FTE)</b> | <b>8.00</b>       | <b>8.00</b>       | <b>8.00</b>       | <b>8.00</b>       |

## 2019-20 Significant Changes

Within Personnel Services, wages and benefits are budgeted as projected for each employee, including PERS costs. Union overtime in 5120 provides for relief shift funding for union personnel to participate in Inclusion, Unconscious Bias, and Cultural Competency training and Diversity outreach initiatives, as well for relief shift funding for line positions during investigation leaves in the amount of \$10,000. The increase is related to continued training for line employees on inclusion, unconscious bias and cultural competency and participation in the Portland Fire Camp for Girls, and other events.

Within Materials and Services, account 5410, General Legal, for \$15,000; and account 5411, Collective Bargaining, \$15,000 are budgeted for ongoing labor and employment issues. Consultant Fees in 5413, reflects \$46,800 for equity and inclusion training, \$41,000 for pay equity consultants and \$20,000 for consulting services for a variety of assistance on issues such as labor, class/compensation, investigations and other areas. Other Professional Services, account 5414, for \$58,724, includes \$22,680 for broker fees for medical insurance, \$24,000 for background investigations for Volunteer firefighter candidates, and other amounts for leadership and management assessment, development, and training; \$5,000 for drug and alcohol testing for pre-employment, and fees for online background checks; and other matters.

### 2019-20 Significant Changes, continued

Account 5472, Employee Recognition and Awards for \$30,010, accounts for length of service awards, nominal retirement gifts, and the District's Meritorious Awards Ceremony including medals and the costs of the event. The increased amounts relate to increased numbers of retirement and meritorious award recipients. Miscellaneous Business Expenses, account 5570, for \$23,629 reflects Diversity program sponsorship and outreach program fees, job fair fees, and event support costs, including \$8,175 for District Day event costs.

### Status of 2018-19 Tactics

- Develop a records management framework for human resources-related records, including defining retention policy, clarifying access, and identifying records management practices for the HR Division.

Goal/Strategy: Goal 1

Timeframe: 24 months

Partner(s): Records business unit

Budget Impact: None

Measured By: Completion of a comprehensive plan for managing, retaining, and providing access to HR-related records, and all HR records aligned with that plan.

Status: → Ongoing

Status Report: Partially drafted the framework for records retention, access and management.

- Develop a plan for integrating organizational strategic planning, strategic workforce planning, and talent management actions. Address alternatives to the Lominger library of competencies, competency modeling aligned with strategic workforce planning, and budget realities.

Goal/Strategy: Goal 2

Timeframe: 12 months

Partner(s): Fire Chief's Office

Budget Impact: None

Measured By: Plan completed by Summer 2019.

Status: ≠ No Longer Relevant

Status Report: Plan drafted; key decisions placed on hold pending direction from FCO.

- Identify organizational education topics that add value for workforce skills development; facilitate access to expertise, tools, and training content for those topics. Examples: How to evaluate programs/initiatives, change management best practices, and tools for assessing and developing operational efficiencies (e.g., LEAN).

Goal/Strategy: Goal 2 – Strategy 2H

Timeframe: 12 months

Partner(s): All divisions

Budget Impact: Increase required

Measured By: Availability of effective training, and tools for selected topic areas.

Status: √ Complete

Status Report: A set of prioritized organizational learning topics was identified based primarily on a needs analysis survey of all employees. This was provided to executive leadership.

## Status of 2018-19 Tactics, continued

- Develop the Outreach and Mentor teams to implement the workforce diversity recruitment elements outlined in the Strategic Outreach Plan.

Goal/Strategy: Goal 2  
 Timeframe: 12 months  
 Partner(s): Integrated Operations, Public Education, Civil Service Commission  
 Budget Impact: Increase required  
 Measured By: Participation on the Outreach and Mentor Teams by trained, committed, internal uniformed personnel and in activities aligned with the Strategic Outreach Plan.

Status: ≠ No Longer Relevant

Status Report: Human Resources recruited for, and coached members who participate on, the Outreach and Mentor teams. A resource page was added on the SharePoint site for team members to access speaking points, FAQ documents, calendars and more to ensure they have all the tools to feel comfortable and confident in their team member roles. Curriculum for training opportunities specific for each team is being developed to ensure they have all the tools necessary for effective participation

Moving forward, tactics for and activity in this area will be published under the Civil Service Commission budget pages.

- Evaluate candidate selection processes and tools to ensure that identified vacancies for all positions are filled with diverse, qualified candidates and in an efficient and cost-effective manner.

Goal/Strategy: Goal 2  
 Timeframe: 12 months  
 Partner(s): All divisions, Civil Service Commission  
 Budget Impact: None  
 Measured By: Applicant tracking software enhancements implemented to optimize efficiencies in and evaluation of internal processes. Audits of all outreach, recruitment and selection processes and tools conducted, and need improvements identified.

Status: ≠ No Longer Relevant

Status Report: The District Leadership approved, and Human Resources adopted, updates to the selection processes for entry firefighter. Additional tools and updates will be reviewed and implemented during the upcoming fiscal year.

Moving forward, tactics and activity in this area will be published under the Civil Service Commission budget pages.

### Additional Accomplishments

- Partnered with Operations to complete negotiations to establish a new collective bargaining agreement for the Fleet bargaining unit
- Coordinated the delivery of training on inclusion, unconscious bias and diversity for Lieutenants, prospective Lieutenants, Medical Services Officers, Training Officers, and Deputy Fire Marshals. Coordinated the delivery of leadership training on inclusion, equity and diversity.
- Successfully completed three executive-level recruitment and selection processes. Coordinated the Fire Chief selection process. Conducted the Chief Financial Officer recruitment/selection process. Coordinated the Assistant Chief selection process.
- Completed a significant portion of work related to complying with Oregon's equal pay law.
- Developed and managed implementation of non-union pay practice changes (movement to a modified step structure).



## Activities Summary

| Service Measure  | 2015-16<br>Actual | 2016-17<br>Actual | 2017-18<br>Actual | 2018-19<br>Projected | 2019-20<br>Estimated |
|--|-------------------|-------------------|-------------------|----------------------|----------------------|
| HR FTE   | 7                 | 8                 | 8                 | 8                    | 8                    |
| Total number of employees  | 496               | 555               | 571               | 580                  | 584                  |
| Union  | 387               | 444               | 459               | 466                  | 470                  |
| Non-Union  | 109               | 111               | 112               | 114                  | 114                  |
| Total number of volunteers   | 45                | 105               | 79                | 80                   | 75                   |
| Number of employees hired  | 32                | 89                | 30                | 26                   | 20                   |
| Volunteers on-boarded  |                   | 79                | 9                 | 16                   | 10                   |
| Number of employee separations   | 7                 | 13                | 8                 | 8                    | 8                    |
| Number of volunteer separations  | 31                | 19                | 35                | 15                   | 15                   |
| Number of employee retirements   | 4                 | 17                | 6                 | 9                    | 8                    |
| Number of Workers' Compensation Claims processed   | 57                | 63                | 87                | 55                   | 65                   |
| Number of Family Medical Leave Requests Processed  |                   |                   | 39                | 87                   | 90                   |
| Number of selection processes completed (Total)  | 30                | 22                | 26                | 25                   | 25                   |
| Civil Service  | 21                | 10                | 11                | 13                   | 13                   |
| Non-Civil Service  | 9                 | 12                | 15                | 12                   | 12                   |
| Number of recognition events<br>(Promotional ceremonies and Meritorious Awards)  | 3                 | 3                 | 3                 | 3                    | 3                    |
| Number of employees recognized<br>(Meritorious Awards, Years of Service Pins, Promotions,<br>Retirement Parties, Employee of the Quarter Awardees) | 140               | 183               | 109               | 172                  | 153                  |
| Number of Employee of the Quarter nominations  | 9                 | 7                 | 6                 | 8                    | 7                    |
| Personnel Actions Processed  | 1,671             | 2,015             | 1,843             | 2,400                | 2,400                |
| Turnover rate ( <i>not including retirements</i> )   | 0.6%              | 2.5%              | 1.4%              | 1.2%                 | 2.0%                 |
| Turnover rate ( <i>including retirements</i> )   | 2.3%              | 5.7%              | 2.8%              | 1.7%                 | 3.0%                 |
| Number of non- Civil Service applications processed  | 486               | 412               | 585               | 450                  | 450                  |

### 2019-20 Tactics

- Develop a records management framework for human resources-related records, including defining a retention policy, clarifying access, and identifying records management practices for the HR Division.

Goal/Strategy: Goal 1

Timeframe: 24 months (year 2 of 2)

Partner(s): Business Strategy/Records personnel

Budget Impact: None

Measured By: Completion of a comprehensive plan for managing, retaining, and providing access to HR-related records, and all HR records aligned with that plan.

- Deliver Inclusion, Unconscious Bias and Diversity training to over 400 line employees, via multi- company training at the Training Center.

Goal/Strategy: Goal 2 – Strategy 2I

Timeframe: 12 months

Partner(s): Training Department

Budget Impact: Increase required

Measured By: Training session delivered. Anticipated increase in employee awareness, skills and motivation to work inclusively, and integrate differences to build inclusive and mindful teams. Anticipated increase in personnel who understand why diversity and inclusion are important to TVF&R and how unconscious bias and culture affect decision-making and learn practical tools to mitigate bias.

- Continue with Oregon Pay Equity analysis for job classifications based on comparable characteristics and analyze each employee pay based on bona fide factors. Update business processes and policies to align with new law.

Goal/Strategy: Goal 2

Timeframe: 12 months

Partner(s): Finance and consulting services

Budget Impact: Increase required

Measured By: Analyses completed. Business process and policies modified. Compliance with Oregon's Pay Equity law. Prevention of discrimination on the basis of an employee's status as a member of a protected class, in the payment of wages or other compensation for work of comparable character.

## Human Resources, continued

|                                    | 2016-17<br>Actual | 2017-18<br>Actual | 2018-19<br>Adopted<br>Budget | 2019-20<br>Proposed<br>Budget | 2019-20<br>Approved<br>Budget | 2019-20<br>Adopted<br>Budget |
|------------------------------------|-------------------|-------------------|------------------------------|-------------------------------|-------------------------------|------------------------------|
| <b>10304 General Fund</b>          |                   |                   |                              |                               |                               |                              |
| 5002 Salaries & Wages Nonunion     | \$ 625,882        | \$ 657,148        | \$ 661,761                   | \$ 700,695                    | \$ 700,695                    | \$ 700,695                   |
| 5004 Vacation Taken Nonunion       | 35,615            | 29,704            | 51,470                       | 56,739                        | 56,739                        | 56,739                       |
| 5006 Sick Taken Nonunion           | 24,424            | 5,497             | 14,706                       | 16,390                        | 16,390                        | 16,390                       |
| 5008 Personal Leave Taken Nonunion | 4,620             | 3,504             | 7,353                        | 6,634                         | 6,634                         | 6,634                        |
| 5010 Comp Taken Nonunion           | 1,449             | 1,723             |                              |                               |                               |                              |
| 5015 Vacation Sold                 |                   | 5,235             | 17,676                       | 19,413                        | 19,413                        | 19,413                       |
| 5016 Vacation Sold at Retirement   | 179               | 7,679             |                              |                               |                               |                              |
| 5017 PEHP Vac Sold at Retirement   |                   | 29,151            |                              |                               |                               |                              |
| 5021 Deferred Comp Match Nonunion  | 39,771            | 37,657            | 44,408                       | 46,946                        | 46,946                        | 46,946                       |
| 5120 Overtime Union                | 18,123            | 29,008            | 65,114                       | 73,985                        | 73,985                        | 73,985                       |
| 5121 Overtime Nonunion             |                   |                   | 750                          | 750                           | 750                           | 750                          |
| 5201 PERS Taxes                    | 119,453           | 151,531           | 166,310                      | 219,016                       | 219,016                       | 219,016                      |
| 5203 FICA/MEDI                     | 50,875            | 52,298            | 63,223                       | 71,077                        | 71,077                        | 71,077                       |
| 5206 Worker's Comp                 | 8,412             | 8,216             | 11,103                       | 11,846                        | 11,846                        | 11,846                       |
| 5207 TriMet/Wilsonville Tax        | 5,130             | 5,356             | 6,567                        | 7,189                         | 7,189                         | 7,189                        |
| 5208 OR Worker's Benefit Fund Tax  | 231               | 234               | 240                          | 225                           | 225                           | 225                          |
| 5211 Medical Ins Nonunion          | 131,493           | 158,893           | 175,177                      | 182,116                       | 182,116                       | 182,116                      |
| 5221 Post Retire Ins Nonunion      | 6,825             | 6,600             | 7,200                        | 7,200                         | 7,200                         | 7,200                        |
| 5230 Dental Ins Nonunion           | 11,592            | 13,638            | 13,586                       | 16,326                        | 16,326                        | 16,326                       |
| 5240 Life/Disability Insurance     | 6,319             | 6,281             | 7,353                        | 6,676                         | 6,676                         | 6,676                        |
| 5250 Unemployment Insurance        | 11,384            | 2,780             | 18,000                       | 18,000                        | 18,000                        | 18,000                       |
| 5260 Employee Assist Insurance     | 11,880            | 14,837            | 15,444                       | 14,898                        | 14,898                        | 14,898                       |
| 5290 Employee Tuition Reimburse    | 444               | 1,376             | 2,800                        | 4,640                         | 4,640                         | 4,640                        |
| 5295 Vehicle/Cell Allowance        | 7,410             | 7,560             | 7,560                        | 7,560                         | 7,560                         | 7,560                        |
| <b>Total Personnel Services</b>    | <b>1,121,511</b>  | <b>1,235,908</b>  | <b>1,357,801</b>             | <b>1,488,321</b>              | <b>1,488,321</b>              | <b>1,488,321</b>             |
| 5300 Office Supplies               | 247               | 433               | 500                          | 500                           | 500                           | 500                          |
| 5301 Special Department Supplies   | 358               | 272               | 1,000                        | 500                           | 500                           | 500                          |
| 5302 Training Supplies             | 84                | 364               | 375                          | 425                           | 425                           | 425                          |
| 5330 Noncapital Furniture & Equip  | 3,998             | 1,003             |                              |                               |                               |                              |
| 5400 Insurance Premium             | 323               | 323               |                              | 350                           | 350                           | 350                          |
| 5410 General Legal                 | 15,943            | 8,488             | 10,000                       | 15,000                        | 15,000                        | 15,000                       |
| 5411 Collective Bargaining         | 2,054             | 13,685            | 85,000                       | 15,000                        | 15,000                        | 15,000                       |
| 5413 Consultant Fees               |                   | 12,990            | 17,000                       | 66,800                        | 66,800                        | 107,800                      |
| 5414 Other Professional Services   | 39,722            | 17,958            | 54,705                       | 58,724                        | 58,724                        | 58,724                       |
| 5415 Printing                      | 908               | 271               | 300                          | 500                           | 500                           | 500                          |
| 5417 Temporary Services            |                   | 9,043             |                              | 3,780                         | 3,780                         | 3,780                        |
| 5461 External Training             | 6,020             | 6,531             | 7,120                        | 10,105                        | 10,105                        | 10,105                       |
| 5462 Travel and Per Diem           | 3,658             | 2,062             | 5,150                        | 7,000                         | 7,000                         | 7,000                        |
| 5472 Employee Recog & Awards       | 16,738            | 10,352            | 24,910                       | 30,010                        | 30,010                        | 30,010                       |

## Human Resources, continued

|                                     | 2016-17<br>Actual   | 2017-18<br>Actual   | 2018-19<br>Adopted<br>Budget | 2019-20<br>Proposed<br>Budget | 2019-20<br>Approved<br>Budget | 2019-20<br>Adopted<br>Budget |
|-------------------------------------|---------------------|---------------------|------------------------------|-------------------------------|-------------------------------|------------------------------|
| 5484 Postage UPS & Shipping         | 94                  | 37                  | 100                          | 100                           | 100                           | 100                          |
| 5500 Dues & Subscriptions           | 5,017               | 6,335               | 6,892                        | 9,126                         | 9,126                         | 9,126                        |
| 5570 Misc Business Exp              | 4,036               | 8,055               | 14,167                       | 23,629                        | 23,629                        | 23,629                       |
| 5571 Planning Retreat Expense       |                     |                     | 400                          | 400                           | 400                           | 400                          |
| 5572 Advertis/Public Notice         | 4,374               | 1,682               | 4,250                        | 4,250                         | 4,250                         | 4,250                        |
| <b>Total Materials and Services</b> | <b>103,573</b>      | <b>99,885</b>       | <b>231,869</b>               | <b>246,199</b>                | <b>246,199</b>                | <b>287,199</b>               |
| <b>Total General Fund</b>           | <b>\$ 1,225,084</b> | <b>\$ 1,335,793</b> | <b>\$ 1,589,670</b>          | <b>\$ 1,734,520</b>           | <b>\$ 1,734,520</b>           | <b>\$1,775,520</b>           |