

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	2010-11 Actual	2011-12 Actual	2012-13 Budget	2013-14 Budget
Personnel Services	\$688,108	\$787,799	\$854,375	\$967,734
Materials and Services	65,333	68,530	99,134	144,135
Total Expenditures	\$753,441	\$856,329	\$953,509	\$1,111,869

PERSONNEL SUMMARY

Position	2010-11 Actual	2011-12 Actual	2012-13 Budget	2013-14 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 Assistant	1.00	1.00	1.00	1.00
Total Full-Time Equivalents (FTE)	6.00	6.00	6.00	6.00

2013-14 SIGNIFICANT CHANGES

The increase in Personnel Services reflects increased costs of wages and benefits, Union overtime in 5120 providing for relief shift funding for line positions during investigation leaves in the amount of \$10,000, and an additional amount of \$11,240 for Strategic Goal V Committee work and outreach efforts, the retirement of the Director, and \$9,446 in overtime associated with the Integrated Talent Management program.

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 \$50,455, reflects \$10,000 for a consultant to help develop a strategic multi-year outreach plan to broaden the District's diversity; \$25,205 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 \$5,000. Account 5417, Temporary Services, for \$11,700, reflects increased staffing requirements due to expected high levels of recruitment, examination, and selection activities for 2013-14. Account 5570, Miscellaneous Expenses, includes \$2,800 for job fair entry fees, and \$1,000 for awards and promotional ceremonies among other items. Account 5472 includes funding of \$7,200 for retirement recognition and \$6,000 for the Meritorious Awards Ceremony, in addition to Employee of the Quarter recognition and Length of Service Awards.

Human Resources, continued

STATUS OF 2012-13 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: Between July 1, 2011 and June 30, 2012, the District received a total of \$39,273 in reimbursements from SAIF.

- Successfully attract, select, retain, and promote qualified personnel in all District positions.

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 survey ratings continue to consistently be "4" or "5" on a 5-point scale. Non-retirement voluntary turnover remains extremely low. Exit interviews have not revealed any systemic issues with workplace satisfaction leading to turnover. All newly hired/promoted personnel in non-Civil Service positions successfully completed trial service periods that were scheduled to end during the last fiscal year.

- Ongoing analysis of positions to assure 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 assure 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: Several reclassification analyses were performed during the period, resulting in some grade and salary adjustments relative to individuals in those jobs. The District continues to participate in two formal salary surveys to ensure classifications are appropriately graded in the salary structure.

STATUS OF 2012-13 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
Service Type(s):	Essential
Measured By:	100% compliance for all employees to receive a written performance evaluation annually on July 1 st delivered during a face-to-face meeting with their managers. 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 feedback both positive and negative.
Status or Outcome:	The District moved to a July 1 st focal cycle this past year and committed significant effort to supporting compliance and quality of performance evaluations. For non-line employees, the currency of employee evaluations went from 316 cumulative months of overdue evaluations (each overdue evaluation multiplied by the number of months overdue) to zero, or 100% compliance. 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:	In addition to developing the Job Change Form and accompanying Standard Operating Guideline (SOG) to help clarify the intentions of the authorizing manager, the HR team has put considerable effort into developing auditing protocols to catch errors prior to payroll transmission. This appears to have significantly minimized the risk of errors that are not caught before payroll processes actions. MUNIS does not have a comprehensive auditing function that could further reduce the risk of error. Only one data entry error is known to have occurred over the period that was not noticed by HR staff.

Human Resources, continued

STATUS OF 2012-13 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 3 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 towards 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:	HR continues to participate in the Strategic Goal V taskforce led by the Fire Chief's Office. Other support is pending identification of needs by the taskforce.

- **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. Scope and duration of project has increased after initial training.

Goal(s)/Call(s) for Action:	VI/7
Budget Impact:	Minimal budget impact with primary framework developed with existing HR resources. Some cost for staff training and materials. Medium and long-term budget impact to be assessed as framework developed.
Duration:	Year 2 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:	In September 2012, Executive Staff sponsored a change management plan to engage the District's workforce in creating a shared vision for how to bring talent management practices to the District. Human Resources coordinated this change management process during the fall of 2012, with a series of discussion on various topics related to talent management and leadership development. Executive Staff also chartered a project team to move the initiative forward. This team was identified and convened in February, led by the HR Manager. The immediate work of the project team is to set priorities for developing/aligning system components and beginning work on competency modeling for the organization and jobs.

STATUS OF 2012-13 CHANGE STRATEGIES, CONTINUED

- 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 2 of 2
Budget Description:	The first step will be to evaluate various training/tracking methods. Once a delivery system is selected, work with identified vendor to build a sustainable supervisory development program.
Partner(s):	Training, Integrated Operations, Fire Chief's Office
Status or Outcome:	This year, two programs were developed to address supervisor and manager training. First, HR has partnered with the Finance Division to develop three-hour "boot camp" training for new supervisors (newly hired or promoted). This training will orient new supervisors to a variety of responsibilities and expectations relevant to the supervisory role at TVF&R, including performance management, injuries/illness and leaves of absence, MUNIS, timesheets, ethics, employment processes, and many other topics. Secondly, a group of executives and Division Chiefs/managers concurrently participated in a series of 12 online classes through the Harvard ManageMentor® program. For six of those classes, a two-hour group debrief was conducted to enhance the learning outcomes.

- Pilot a "peak period" employment resourcing program, evaluating, and utilizing the appropriate resources to assist with employment activities during peak periods of employment activity. Resources may be internal or external depending on the vacancy, availability of internal support/assistance, and priority of the recruitment.

Goal(s)/Call(s) for Action:	VI/C, D, 3, and 4
Budget Impact:	May have budget impact depending on the kinds of support needed to meet demand.
Duration:	Year 1 of 1
Budget Description:	Identify various methods of resourcing employment processes, including developing interview questions, phone screening candidates, scheduling interviews, and participating in the interview process.
Partner(s):	Potentially multiple divisions
Status or Outcome:	This change strategy was modified. Alternative means of resourcing peak periods of employment activity pursued.

- Implement the Human Resource side of a new labor contract. Depending on what the finalized contract brings, HR must interpret and adapt policies and procedures that reflect the new contract language.

Goal(s)/Call(s) for Action:	VI/5
Budget Impact:	Resource neutral
Duration:	Year 1 of 3
Budget Description:	Reflective of new contract agreements.
Partner(s):	Fire Chief's Office, Finance Division
Status or Outcome:	Human Resources is doing a number of activities associated with the labor contract that went into effect July 1, 2012, including updating salary schedules, modifying policies and procedures associated with schedule changes (from 53-hour to 52-hour work weeks), administering the lump sum payment identified in the contract, and updating seniority schedules.

Human Resources, continued

ADDITIONAL 2012-13 ACCOMPLISHMENTS

- Used MUNIS Self-Serve to facilitate open enrollment for health and dental plans.
- Moved to a new flexible spending plan administrator (Genesis) for non-Union employees. Worked with the Union in transitioning to the same plan administrator, to occur July 1, 2013.
- Improved information available to employees planning retirement.
- Partnered with Union leadership to better support injured employees through the Workers' Compensation process.
- Negotiated enhancements to non-Union healthcare plans at no additional cost.

2013-14 SERVICE MEASURES

	FY 09-10	FY 10-11	FY 11-12	FY 12-13 estimated	FY 13-14 projected
HR FTE	6.0	6.0	6.0	6.0	6.0
Total number of employees	427	441	447	460	474
Union	318	328	330	345	358
Non-Union	113	113	117	115	116
Total number of volunteers	66	56	58	62	64
Number of employees hired	28	34	20	22	24
Volunteers onboarded	15	13	11	15	15
Number of employee separations	9	8	5	6	6
Number of volunteer separations	20	23	9	11	13
Number of employee retirements	4	12	9	3	4
Average number of Union employees on STD (short term disability) per week	3.2	4.9	3.3	2.5	2.5
Average duration of weeks on STD per employee	10.5	11.1	10.1	10.25	10
Average weekly number of line personnel off-duty for injury or illness both work and non-work related	14.3	13.4	10.2	9	8.75
Number of selection processes completed (Total)	20	21	17	30	38
Civil Service	5	9	6	14	19
Non-Civil Service	15	12	11	16	19
Turnover percentage (<i>not including retirements</i>)	2.1%	1.9%	.9%	1.4%	1.2%
Turnover percentage (<i>including retirements</i>)	3.7%	4.6%	2.7%	2.2%	2.0%
Number of applications processed	890	573	473	500	700

2013-14 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: 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.

- **Successfully attract, select, retain, and promote qualified personnel** for all District positions. An anticipated higher volume of employment activity during 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.

- **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.

- **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.

- **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.

Human Resources, continued

2013-14 SERVICE MEASURES, CONTINUED

- 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).

- 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.

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

- 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

2013-14 CHANGE STRATEGIES, CONTINUED

- 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



Human Resources, continued

		Actual Prior FY 2011	Actual Prior FY 2012	Budget Prior FY 2013	Budget Proposed FY 2014	Budget Approved FY 2014	Budget Adopted FY 2014
10304	General Fund						
5002	Salaries & Wages Nonunion	406,032	426,262	458,227	465,376	465,376	465,376
5004	Vacation Taken Nonunion	26,884	29,947	35,248	35,801	35,801	35,801
5006	Sick Taken Nonunion	8,586	13,906	7,050	7,162	7,162	7,162
5008	Personal Leave Taken Nonunion	1,764	1,667	3,021	3,071	3,071	3,071
5010	Comp Taken Nonunion	914	1,286				
5015	Vacation Sold		9,338	12,104	9,835	9,835	9,835
5016	Vacation Sold at Retirement				39,241	39,241	39,241
5021	Deferred Comp Match Nonunion	5,910	15,948	20,142	20,459	20,459	23,145
5102	Duty Chief Relief		1,519				
5120	Overtime Union	3,035	12,176	13,106	30,686	30,686	30,686
5121	Overtime Nonunion		45	400	750	750	750
5201	PERS Taxes	85,961	97,519	110,605	132,914	132,914	132,914
5203	FICA/MEDI	33,104	35,765	42,391	47,383	47,383	47,383
5206	Worker's Comp	9,570	12,849	9,974	11,149	11,149	11,149
5207	TriMet/Wilsonville Tax	3,094	3,428	3,889	4,425	4,425	4,425
5208	OR Worker's Benefit Fund Tax	146	154	212	274	274	274
5211	Medical Ins Nonunion	58,479	82,307	84,323	92,942	92,942	92,942
5221	Post Retire Ins Nonunion	4,507	5,250	5,400	5,400	5,400	5,400
5230	Dental Ins Nonunion	10,274	10,947	11,720	12,248	12,248	12,248
5240	Life/Disability Insurance	4,853	4,493	6,923	6,812	6,812	6,812
5250	Unemployment Insurance	9,531	6,793	12,000	18,000	18,000	18,000
5260	Employee Assist Insurance	9,704	10,440	11,880	11,880	11,880	11,880
5290	Employee Tuition Reimburse				2,280	2,280	2,280
5295	Vehicle/Cell Allowance	5,760	5,760	5,760	6,960	6,960	6,960
	Total Personnel Services	688,108	787,799	854,375	965,048	965,048	967,734
5300	Office Supplies	593	176	750	700	700	700
5301	Special Department Supplies	522	135	1,090	500	500	500
5302	Training Supplies	363	265	2,675	4,370	4,370	4,370
5367	M&R Office Equip	3,470	2,517	2,500	2,496	2,496	2,496
5410	General Legal				10,000	10,000	10,000
5411	Collective Bargaining	12,232	15,186	20,000	15,000	15,000	15,000
5414	Other Professional Services	15,547	12,867	42,070	50,455	50,455	50,455
5415	Printing	362	184	500	450	450	450
5417	Temporary Services	11,712			11,700	11,700	11,700
5461	External Training	974	14,268	3,410	13,744	13,744	13,744
5462	Travel and Per Diem	3,726	3,677	3,000	5,350	5,350	5,350
5472	Employee Recog & Awards	9,248	11,396	12,604	16,840	16,840	16,840
5484	Postage UPS & Shipping	78	6	100	100	100	100
5500	Dues & Subscriptions	1,039	2,622	3,555	3,500	3,500	3,500
5570	Misc Business Exp	3,561	4,793	4,480	6,530	6,530	6,530
5571	Planning Retreat Expense	75		400	400	400	400
5572	Advertis/Public Notice	1,831	440	2,000	2,000	2,000	2,000
	Total Materials & Services	65,333	68,530	99,134	144,135	144,135	144,135
	Total General Fund	753,441	856,329	953,509	1,109,183	1,109,183	1,111,869