

# 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, health and wellness, 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	2009-10 Actual	2010-11 Actual	2011-12 Budget	2012-13 Budget
Personnel Services	\$717,214	\$688,108	\$804,030	<b>\$854,375</b>
Materials and Services	131,011	65,333	114,865	<b>99,134</b>
Total Expenditures	\$848,225	\$753,441	\$918,895	<b>\$953,509</b>

## PERSONNEL SUMMARY

Position	2009-10 Actual	2010-11 Budget	2011-12 Budget	2012-13 Budget
Human Resources Director	1.00	1.00	1.00	<b>1.00</b>
Human Resources Manager	0.00	1.00	1.00	<b>1.00</b>
Sr. Benefits Administrator	1.00	1.00	1.00	<b>1.00</b>
Human Resources Data Analyst	1.00	1.00	1.00	<b>1.00</b>
Sr. Employment Coordinator	1.00	1.00	1.00	<b>1.00</b>
Labor Relations Manager	0.50	0.00	0.00	<b>0.00</b>
Behavioral Health Specialist	0.50	0.00	0.00	<b>0.00</b>
Human Resources Assistant	1.00	1.00	1.00	<b>1.00</b>
Total Full-Time Equivalents (FTE)	6.00	6.00	6.00	<b>6.00</b>

## 2012-13 SIGNIFICANT CHANGES

The increase in Personnel Services reflects increased costs of wages and benefits. Union overtime in 5120 provides for relief shift funding for line positions during investigation leaves in the amount of \$10,000 and additional amount of \$2,182 for Goal V Committee work.

Within Materials and Services, account 5411, Collective Bargaining, \$20,000 is budgeted for ongoing labor and employment issues. Other Professional Services, for \$42,070, reflects \$10,000 for a consultant to help develop a strategic multi-year outreach plan to broaden the District's diversity, \$7,500 for supervisory and management development and training, \$5,000 for drug and alcohol testing for pre-employment, and other fees for background checks, personality assessments, and other matters. Account 5570, Miscellaneous Expenses, includes \$2,250 for job fair entry fees, and \$1,000 for awards and promotion ceremonies among other items. Account 5472 includes funding of \$4,000 for retirement recognition and \$6,000 for the Meritorious Awards Ceremony.

## *Human Resources, continued*

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### **STATUS OF 2011-12 SERVICE MEASURES**

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

**Goal(s):** 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, 2010 and June 30, 2011, the District received a total of \$58,580.96 in reimbursements from SAIF.

- **Successfully attract, select, retain, and promote qualified personnel** to fill non-Civil Service positions.

**Goal(s):** VI  
**Service Type(s):** Mandatory  
**Measured By:** Timely recruitment, well-organized and coordinated interview and testing processes, and a voluntary hiring manager's survey, which HR requests to be completed after each recruitment process.  
**Status or Outcome:** Successfully completed six recruitments and anticipate an additional four for the remaining of the fiscal year. Feedback from hiring managers via survey has consistently been a rating of 4 - 5 out of 5. Newly promoted or hired employees in non-Civil Service positions last fiscal year to date have successfully completed their trial service periods.

- **Conduct job analysis on new and changing jobs** in order to maintain up-to-date job descriptions, while ensuring jobs are appropriately slotted into the non-represented salary grade chart.

**Goal(s):** VI, VIII  
**Service Type(s):** Essential  
**Measured By:** Ongoing analysis of positions, for both content and cost, to ensure the right work is being done and positions are correctly assigned into the appropriate salary grade.  
**Status or Outcome:** All job descriptions have been updated to reflect consistent format template designed in 2008. Formal job analyses have been conducted for several positions, including new positions and several reclassifications.

- **Process annual employee performance evaluations** for the District. Review for content, timeliness, and quality, ensuring that merit pay requests match performance levels as outlined in the budget document.

**Goal(s):** VI, VIII  
**Service Type(s):** Essential  
**Measured By:** Continued efforts towards 100% compliance by supervisors and managers for completion of well-written, timely evaluations.  
**Status or Outcome:** After a thorough review of the performance evaluation process, the District has changed the due date for all performance evaluations to July 1<sup>st</sup>. With all evaluations due on July 1<sup>st</sup>, a more thorough review can be done for quality and timeliness. Managers will evaluate all employee performance at the same time each year, which aligns all merit-based increases at the same time for budgeting purposes. Evaluation forms and processes have also been revised as part of the cycle change.

### STATUS OF 2011-12 CHANGE STRATEGIES

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

**Goal(s)/Call(s) for Action:** V/A  
**Budget Impact:** Could be significant based on recommendations of steering committee.  
**Duration:** Year 2 of 5  
**Budget Description:** With a diversity/outreach plan, the District can systematically work towards educating employees on the importance of a diverse workforce, increasing the diversity, and enabling improvement of diversity statistics to more closely reflect the community.  
**Partner(s):** Integrated Operations, Division Managers, Assistant Chiefs, Fire Chief's Office  
**Status or Outcome:** Selected by the Fire Chief, a diversity taskforce will complete the identified diversity plan and deliverables for the first year of the plan. Taskforce meetings are ongoing as they formulate strategies to accomplish the goal.

- **Develop a competency based model for organizational advancement** - to be used in job descriptions, employee selection, professional development, performance evaluations, and succession planning.

**Goal(s)/Call(s) for Action:** V, VI/C and D  
**Budget Impact:** Some budget impact is expected during the training and implementation phase.  
**Duration:** Year 1 of 3  
**Budget Description:** Years 1 and 2 will require training of staff in the competency-based model of employee development.  
**Partner(s):** Integrated Operations, Division Managers, Assistant Chiefs, Fire Chief's Office  
**Status or Outcome:** Training occurred in September 2011, to begin the process for implementing a competency-based program for organizational talent management. Staff will continue to develop a well-structured multi-functional program; however, efforts have already begun to initially address competency-based job evaluation and job descriptions, as well as short- and long-term developmental opportunities. This will be replaced in fiscal year 2012-13 with an expanded Change Strategy having a duration of five years.

- **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 1 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:** Several options are being considered to create a sustainable, ongoing training program to increase supervisor and managerial skills among staff with leadership responsibilities. Options include web-based training, classroom training, and on-site programs. The first phase of the program should be implemented by the end of fiscal year 11/12.

## *Human Resources, continued*

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### **STATUS OF 2011-12 CHANGE STRATEGIES, CONTINUED**

- **Go out for bid on third party administrator for applicable employee benefits.**

**Goal(s)/Call(s) for Action:** IV, VIII  
**Budget Impact:** Resource neutral  
**Duration:** Year 1 of 1  
**Budget Description:** The District's third party administrator manages the Health Reimbursement Account (HRA) and Flexible Spending Account (FSA) programs for District employees.  
**Partner(s):** Finance  
**Status or Outcome:** HR received bids from four vendors and selected Genesis Employee Benefits as the new third party administrator. The plan selected is paperless (which is in keeping with the District's sustainability objective) and is also more cost effective than the prior third party administrator. Union represented employees will move to the new provider at the beginning of fiscal year 12/13, with their July benefits renewal.

### **2011-12 ADDITIONAL ACCOMPLISHMENTS**

- Comprehensive revisions were completed to the five Standard Operating Guidelines (SOGs) effecting pay practices. These changes support the change to a July 1<sup>st</sup> focal performance evaluation date for all employees, and define and align policies to assure they reflect current practices and directives from the Fire Chief's Office.
- Conducted first benefits open enrollment process for non-Union staff that was entirely electronic and completely paperless.
- After moving to an open and continuous process for testing and entrance list creation for firefighters, selected the first group of candidates from the new list for the 12-01 Academy.
- House Bill 3207 changed requirements for employer treatment of military veteran job applicants. The changes were unclear and ambiguous. The District's Human Resources Manager actively engaged in the legal process and successfully had the language changed in order to create more clarity for public employers.
- Utilizing MUNIS, staff created an automated notification process for individuals on the District's job interest list, a process that was previously managed through paper and e-mail.

### **2012-13 SERVICE MEASURES**

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

**Goal(s):** 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** in all District positions.

**Goal(s):** 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.

**2012-13 SERVICE MEASURES, CONTINUED**

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

**Goal(s):** 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.

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

**Goal(s):** VI  
**Service Type(s):** Essential  
**Measured By:** 100% compliance for all employees to receive a written performance evaluation annually on July 1<sup>st</sup> delivered during a face-to-face meeting with their 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 feedback both positive and negative.

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

**Goal(s):** 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

### 2012-13 SERVICE MEASURES, CONTINUED

	FY 08-09	FY 09-10	FY 10-11	FY 11-12 estimated	FY 12-13 projected
HR FTE	6.0	6.0	6.0	6.0	6.0
Total number of employees	412	427	441	449	457
Union	310	318	328	330	337
Non-Union	106	113	113	119	120
Total number of volunteers	71	66	56	59	62
Number of employees hired	25	28	34	21	16
Volunteers onboarded	13	15	13	13	13
Number of employee separations	10	9	8	4	4
Number of volunteer separations	6	20	23	10	10
Number of employee retirements	10	4	12	9	4
Average number of Union employees on STD (short term disability) per week	3.3	3.2	4.9	4.5	4.7
Average duration of weeks on STD per employee	9.8	10.5	11.1	11.5	11.6
Average weekly number of line personnel off-duty for injury or illness both work and non-work related	12.5	14.3	13.4	13.0	13.5
Number of selection processes completed (Total)	21	20	21	20	25
Civil Service	9	5	9	10	15
Non-Civil Service	12	15	12	10	10
Turnover percentage ( <i>not including retirements</i> )	N/A	2.1%	1.9%	1.8%	2.0%
Turnover percentage ( <i>including retirements</i> )	N/A	3.7%	4.6%	3.0%	4.0%
Number of applications processed	1115	890	573	369	600

### 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

### 2012-13 CHANGE STRATEGIES, CONTINUED

- **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

- **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

- **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

- **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



## Human Resources, continued

	Actual Prior FY 2010	Actual Prior FY 2011	Budget Prior FY 2012	Budget Proposed FY 2013	Budget Approved FY 2013	Budget Adopted FY 2013
<b>10304 General Fund</b>						
5002 Salaries & Wages Nonunion	444,171	406,032	443,312	<b>458,227</b>	<b>458,227</b>	<b>458,227</b>
5004 Vacation Taken Nonunion	19,699	26,884	43,596	<b>35,248</b>	<b>35,248</b>	<b>35,248</b>
5006 Sick Taken Nonunion	8,069	8,586		<b>7,050</b>	<b>7,050</b>	<b>7,050</b>
5008 Personal Leave Taken Nonunion	1,045	1,764		<b>3,021</b>	<b>3,021</b>	<b>3,021</b>
5010 Comp Taken Nonunion	671	914				
5015 Vacation Sold			6,987	<b>12,104</b>	<b>12,104</b>	<b>12,104</b>
5021 Deferred Comp Match Nonunion	4,878	5,910	16,954	<b>20,142</b>	<b>20,142</b>	<b>20,142</b>
5120 Overtime Union	9,684	3,035	10,000	<b>12,182</b>	<b>12,182</b>	<b>13,106</b>
5121 Overtime Nonunion	127		400	<b>400</b>	<b>400</b>	<b>400</b>
5201 PERS Taxes	74,419	85,961	101,807	<b>110,605</b>	<b>110,605</b>	<b>110,605</b>
5203 FICA/MEDI	36,371	33,104	40,316	<b>42,391</b>	<b>42,391</b>	<b>42,391</b>
5206 Worker's Comp	6,460	9,570	13,715	<b>9,974</b>	<b>9,974</b>	<b>9,974</b>
5207 TriMet/Wilsonville Tax	3,258	3,094	3,646	<b>3,889</b>	<b>3,889</b>	<b>3,889</b>
5208 OR Worker's Benefit Fund Tax	155	146	212	<b>212</b>	<b>212</b>	<b>212</b>
5211 Medical Ins Nonunion	65,038	58,479	66,270	<b>84,323</b>	<b>84,323</b>	<b>84,323</b>
5221 Post Retire Ins Nonunion	4,875	4,507	4,500	<b>5,400</b>	<b>5,400</b>	<b>5,400</b>
5230 Dental Ins Nonunion	10,639	10,274	11,394	<b>11,720</b>	<b>11,720</b>	<b>11,720</b>
5240 Life/Disability Insurance	4,435	4,853	5,491	<b>6,923</b>	<b>6,923</b>	<b>6,923</b>
5250 Unemployment Insurance	5,320	9,531	18,000	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>
5260 Employee Assist Insurance	12,134	9,704	11,670	<b>11,880</b>	<b>11,880</b>	<b>11,880</b>
5270 Uniform Allowance	6					
5295 Vehicle Allowance	5,760	5,760	5,760	<b>5,760</b>	<b>5,760</b>	<b>5,760</b>
<b>Total Personnel Services</b>	<b>717,214</b>	<b>688,108</b>	<b>804,030</b>	<b>853,451</b>	<b>853,451</b>	<b>854,375</b>
5300 Office Supplies	871	593	1,000	<b>750</b>	<b>750</b>	<b>750</b>
5301 Special Department Supplies	529	522	1,975	<b>1,090</b>	<b>1,090</b>	<b>1,090</b>
5302 Training Supplies	54	363	450	<b>2,675</b>	<b>2,675</b>	<b>2,675</b>
5367 M&R Office Equip	1,705	3,470	3,000	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>
5411 Collective Bargaining	14,127	12,232	25,000	<b>20,000</b>	<b>20,000</b>	<b>20,000</b>
5414 Other Professional Services	34,283	15,547	41,250	<b>42,070</b>	<b>42,070</b>	<b>42,070</b>
5415 Printing	30	362	500	<b>500</b>	<b>500</b>	<b>500</b>
5417 Temporary Services	57,605	11,712				
5461 External Training	2,613	974	12,660	<b>3,410</b>	<b>3,410</b>	<b>3,410</b>
5462 Travel and Per Diem	3,461	3,726	3,900	<b>3,000</b>	<b>3,000</b>	<b>3,000</b>
5472 Employee Recog & Awards	8,016	9,248	12,250	<b>12,604</b>	<b>12,604</b>	<b>12,604</b>
5484 Postage UPS & Shipping	259	78	100	<b>100</b>	<b>100</b>	<b>100</b>
5500 Dues & Subscriptions	783	1,039	3,180	<b>3,555</b>	<b>3,555</b>	<b>3,555</b>
5570 Misc Business Exp	2,003	3,561	6,600	<b>4,480</b>	<b>4,480</b>	<b>4,480</b>
5571 Planning Retreat Expense	629	75	500	<b>400</b>	<b>400</b>	<b>400</b>
5572 Advertis/Public Notice	4,044	1,831	2,500	<b>2,000</b>	<b>2,000</b>	<b>2,000</b>
<b>Total Materials &amp; Services</b>	<b>131,011</b>	<b>65,333</b>	<b>114,865</b>	<b>99,134</b>	<b>99,134</b>	<b>99,134</b>
<b>Total General Fund</b>	<b>848,225</b>	<b>753,441</b>	<b>918,895</b>	<b>952,585</b>	<b>952,585</b>	<b>953,509</b>