

CITY OF OAKLAND
AGENDA REPORT

FILED
OFFICE OF THE CITY CLERK
OAKLAND
2004 MAY 27 PM 2:40

TO: Office of the City Administrator
ATTN: Deborah Edgerly
FROM: Finance and Management Agency
DATE: June 8, 2004

RE: SUPPLEMENTAL INFORMATIONAL UPDATE REPORT AND TIMELINE ON THE CITY'S WORKFORCE PLANNING INITIATIVE ADDRESSING STAFFING AND OTHER HUMAN RESOURCE ISSUES PERTINENT TO PUBLIC WORKS OPERATIONS

SUMMARY

This supplemental informational update report and presentation was requested by the Public Works Committee on April 27, 2004 following a preliminary report on the City's short and long range workforce planning goals. The Committee requested a timeline for completion of the short and long-range goals. They also requested more information on replacement planning for public works operational positions, if vacancies will affect service delivery.

FISCAL IMPACT

Since this update report is informational only, no fiscal impacts are included.

BACKGROUND

In March the Office of the City Manager in cooperation with the Finance and Management Agency's Office of Personnel Resource Management, embarked on a strategic plan for workforce succession for the City. This plan will incorporate short and long range goals regarding employee replacement, management and leadership development and continuity, and strategic planning for our future human resource needs. The Succession Planning Steering Committee will provide recommendations and guidance during the start-up phase of the program, which will be the next twelve to eighteen months, and will continue to provide oversight and evaluate the program annually for the next few years. Each Agency/department will select representatives to implement the plan as it is developed.

Item: 3
Public Works Committee
June 8, 2004

Supplemental Informational Update Report and Timeline on the City's Workforce Planning Initiative Addressing Staffing and other Human Resource Issues Pertinent to Public Works Operations

KEY ISSUES AND IMPACTS

While the City of Oakland is currently developing succession plans as part of its long range strategic planning, we are facing a short-term and immediate challenge and opportunity. Cost increases for the new retirement plan, coupled with the impending wave of baby boomers planning on retiring soon will provide a unique opportunity to evaluate the City's organizational structure. The City Council, the City Administrator and the Succession Planning Steering Committee have all recognized this opportunity to review positions in light of budgetary constraints, service delivery efficiencies and potential service gap impacts to the citizens. Long range challenges include the shortage of available employees to meet future staffing needs, competing with other public and private sector employers to meet our needs and providing career development and promotional opportunities to retain current employees. The Succession Planning Steering Committee timeline is attached (see Attachment A) providing target dates for the current short and long range goals.

The Steering Committee has developed a workforce planning tool surveying staff as to their retirement plans. The form was distributed to all City employees with the paychecks on May 13 with a return date of May 21 (Attachment B). Additionally, the Committee will be gathering information from departments regarding the identification of positions and assignments that are critical to the continued operation of core services. This information will provide baseline information that will be helpful in strategic planning for the future. Employee and departmental information will be reviewed and revised annually to make sure we have up-to-date information that will be useful for development of succession plans including recruitment and retention strategies, organizational structure reviews, legacy and mentoring program development and budget planning. This information will be useful in the City Administrator for the budget review.

The City Administrator and the Office of Personnel Resource Management are currently developing policies and procedures to address expediting recruitment efforts and reviewing each individual position that becomes vacant to determine the appropriateness of filling the position.

Development of a tool kit to assist departments is underway for initial distribution in late May and will provide:

- Methods for oral and verbal collection of institutional knowledge
- Sample formats for desk reference/procedures manuals
- Core competency inventories for key positions
- Ideas for developing mentoring and shadowing programs
- Upcoming summer training opportunities for employees to improve skills for promotional opportunities

Supplemental Informational Update Report and Timeline on the City's Workforce Planning Initiative Addressing Staffing and other Human Resource Issues Pertinent to Public Works Operations

Additional work has begun to develop our relationships with local colleges and high schools to provide mentoring opportunities to youth to enable us to "grow our own" employees from entry level positions. The Steering Committee also looks forward to meeting with union officials through the Labor/Management Committee in the Fall of 2004 to collaborate on ideas regarding meeting future human resource demands and finding new ways to work more efficiently and effectively, capitalizing on technology and other emerging resources while meeting the Mayoral and Council goals of providing excellent service to the citizens of Oakland.

The Public Works Agency is working internally to address service gaps that may occur as employees retire in the next several months. The strategies include updating and revising standard operating procedures, going through an internal audit which has led to the creation of desk manuals and other such documentation and detailing specific job duties through the performance appraisal system.

Managers and supervisors within PWA recently attended a training to learn more about succession planning, what is required to foster staff growth and maturity, and how to best implement a process of information and knowledge sharing. There are also reoccurring trainings within the Agency that are mandatory for new managers and supervisors that deal with a variety of subjects from safety to personnel matters.

SUSTAINABLE OPPORTUNITIES

None

DISABILITY AND SENIOR ACCESS

None

RECOMMENDATION AND RATIONALE

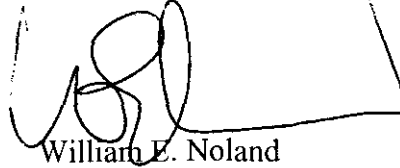
Staff recommends that the Public Works Agency provide biannual updates to the Public Works Committee on efforts towards succession planning specific to Public Works operations.

ACTION REQUESTED OF THE CITY COUNCIL

Staff requests that the Committee accept this informational report.

Supplemental Informational Update Report and Timeline on the City's Workforce Planning Initiative Addressing Staffing and other Human Resource Issues Pertinent to Public Works Operations

Respectfully submitted,



William E. Noland
Director, Finance and Management Agency

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Office of Personnel Resource Management

APPROVED AND FORWARDED TO THE
PUBLIC WORKS COMMITTEE:


OFFICE OF THE CITY ADMINISTRATOR

SUCCESSION PLANNING TIMELINE

Working Document

For FY'03-'04 and FY'04-'05

May 5, 2004

Target Date	Short-term Goals	Whose Responsible
April 30, 2004	Conduct a survey public and private entities to gather "best practices" data and resources available for our use	Succession Planning Coordinator and OPRM staff
April 30, 2004	Develop policy to allow recruitment to occur prior to positions being vacant after review to assess need to fill	Succession Planning Steering Committee
May 7, 2004	Continuous offerings of Succession Planning training for managers and supervisors	Citywide Training Coordinator
May 7, 2004	Identification of staff who will implement the program within each department	Succession Planning Coordinator and Department Heads
May 14, 2004	Conduct a preliminary internal assessment survey to determine where we are currently as to replacement planning in every department	Succession Planning Coordinator and OPRM staff
May 14, 2004	Develop comprehensive data identifying potential retirement projections by department and classification for the next five years	Succession Planning Coordinator and OPRM staff
May 19, 2004	Identify key positions where a potential retirement(s) would affect the delivery of core services	Succession Planning Steering Committee
May 21, 2004	Planning for timely, streamlined and targeted recruitments for promotional and open examinations	OPRM Director
May 21, 2004	Collate projected list citywide info re key positions, assignments or individuals in the City where retirement will impact core service delivery and fold into recruitment process	Succession Planning Steering Committee
May 12-21, 2004	Develop and implement organizational structure review process to assess how to best meet the Council/Mayoral goals for serving the citizens	Succession Planning Steering Committee and City Administrator with assistance from Department Heads and Succession Planning Coordinator
May 21, 2004	Develop and disseminate a variety of tools to capture institutional knowledge including oral, verbal and written methods	Succession Planning Steering Committee
June 25, 2004	Discussions with union representatives regarding their ideas and suggestions for filling key positions	Director of OPRM – Labor Management Committee

Succession Planning Timeline

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Target Date	Long-term Goals	Whose Responsible
May 30, 2004	Identify knowledge, skills and abilities required for all key positions	Succession Planning Coordinator with OPRM Staff
July 21, 2004	Incorporate information on the City's succession planning initiative, including policies and procedures, into the Council mandated Human Resource Training series for managers and supervisors	Succession Planning Coordinator and Citywide Training Coordinator
July 27, 2004	Evaluation of the program progress to date for Finance & Management Committee	Succession Planning Steering Committee
September 30, 2004	Implement program to capture institutional knowledge, undocumented and informal organizational learning processes and knowledge	OPRM Director and Citywide Training Coordinator with Department Personnel Coordinators and other identified department staff
November 30, 2004	Identification of future human resource needs, including when the need will occur and in which department	Succession Planning Steering Committee with Department Heads
December 18, 2004	Collaborate with unions to further develop training to prepare employees to promote to management and supervisory positions and cross train staff and associated costs	Director of OPRM & Labor Management Committee
May 30, 2005	Incorporation of the performance management system in identifying employees with capability and motivation	Steering Committee with Citywide Training Coordinators
June 30, 2005	Develop training curriculum to support career development and promotional opportunities for employees	OPRM Director, Succession Planning Coordinator, Citywide Training Coordinator and OPRM Staff

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