

# **Succession/Workforce Planning Presentation**

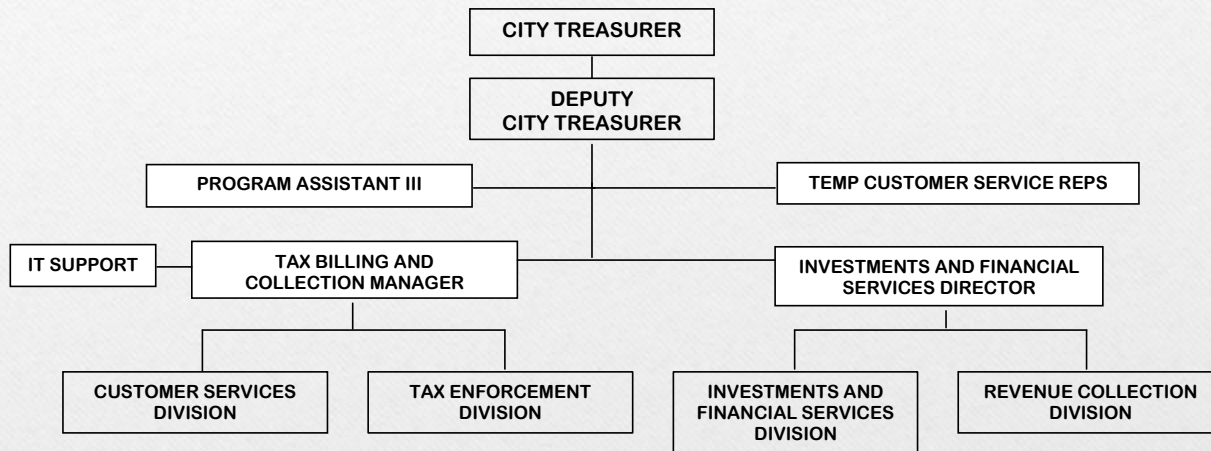
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**Committee on Finance and Personnel**

**Office of the City Treasurer**

**Wednesday, January 15, 2020**

# Department Organization Chart





# Department Positions

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## **Executive Office**

- City Treasurer
- Deputy City Treasurer
- Program Assistant III

## **Administration Division**

- Investments and Financial Services Director <sup>1</sup>
- Tax Billing and Collection Manager <sup>1</sup>
- Business Systems Coordinator
- IT Support Specialist

## **Customer Services Division**

- Customer Services Manager
- 2 - Customer Service Specialist
- Customer Service Representative III - Bilingual
- 5 - Customer Service Representative III

<sup>1</sup> Serves as a Special Deputy City Treasurer

28 Full-Time Positions

2 Part-Time Positions

20 Temporary Positions

## **Tax Enforcement Division**

- Tax Collection and Enforcement Coordinator
- 3 - Tax Enforcement Specialist
- Program Assistant II
- Program Assistant II (0.5 FTE) (Part-time)

## **Investments and Financial Services Division**

- Investments and Financial Services Coordinator
- Investments and Financial Services Specialist
- Accounting Assistant III
- Accounting Assistant I (0.5 FTE) (Part-time)

## **Revenue Collection Division**

- Revenue Collection Manager
- Revenue Collection Specialist
- Teller - Bilingual
- Teller

## **Temporary Staff**

- 20 - Temporary Customer Service Representative I

# Staff Demographics

## Department Regular Staff Demographics

Regular Staff	Female (F)		Male (M)		Total (rounded)	
African American (AA)	3	10%	1	3%	4	14%
American Indian (AI)	0	0%	0	0%	0	0%
Asian (A)	0	0%	0	0%	0	0%
Caucasian (C)	13	45%	4	14%	17	59%
Hispanic (H)	7	24%	1	3%	8	27%
Pacific Islander (PI)	0	0%	0	0%	0	0%
	23	79%	6	21%	29	100%



# Staff Demographics - Continued

## Average Age and Years of Service

Average Age	Average Years of Service
49.1	11

## Department Composition by Generation

	Baby Boomer 1946 - 1964	Generation X 1965 - 1980	Millennial 1981 - 1996	Total
Number of Employees	10	10	9	29
Percentage of Employees	34%	34%	32%	100%

# Staff Demographics - Continued

## Department Temporary Staff Demographics

Temporary Staff	Female (F)		Male (M)		Total (rounded)	
	Count	Percentage	Count	Percentage	Count	Percentage
African American (AA)	4	20%	3	15%	7	35%
American Indian (AI)	1	5%	0	0%	1	5%
Asian (A)	0	0%	0	0%	0	0%
Caucasian (C)	4	20%	1	5%	5	25%
Hispanic (H)	6	30%	1	5%	7	35%
Pacific Islander (PI)	0	0%	0	0%	0	0%
	15	75%	5	25%	20	100%



# Strategic and Operational Considerations

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**External factors expected to impact service delivery and recruitment/retention in the next 3 years.**

- The customer base continues to become more demanding, unreasonable, and rude causing the customer facing positions to be much more stressful.
- The implementation of the new tax system has posed a significant challenge. It has made our jobs more stressful, processes are more time consuming and necessitate working late and weekend hours.
- Until the 2020 budget, we were unable to add positions. However, there are fewer positions and hours available for temporary staff to meet workload demands due to financial constraints, causing unwarranted stress on staff.

# Strategic and Operational Considerations - Continued

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- Staff salaries have not kept pace with the market.
- Limited raises have not kept pace with the increase in the cost of living. Increases in insurance premiums, deductibles, and out-of-pocket costs have reduced disposable income.
- Limited pay for performance funding provides little incentive to go above and beyond.
- Lack of cost-free employee parking is a deterrent.
- Fewer experienced cash handlers are available for recruitment because banking institutions are consolidating or closing, plus businesses have fewer cash transactions.



# Strategic and Operational Considerations - Continued

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Strategies already implemented by department to address external factors impacting service delivery and recruitment/retention.

- We have utilized coaching services and the DER EAP for courses on customer service, dealing with difficult customers, and job stress.
- We heavily cross train and consistently promote from within whenever possible.

# Areas for Development - Continued

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Positions with the most significant turnover in the past 5 years and strategies used to mitigate the impact.

- The Customer Services Representative III position has experienced the most significant turnover, as a result of our office promoting from within, and this being the department's entry level position.



# Areas for Development - Continued

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## Strategies used to develop and retain employees

- Department supervisors to thoroughly train staff well.
- Recognize staff birthdays and anniversaries.
- Conduct staff appreciation lunches.
- Allow flexible schedules when possible.

# Succession Planning

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**Positions that the department has identified for succession planning, including the plan to close the skills gap.**

- There are 7 staff members eligible to retire over the next 3 years. All but the Customer Service Representative III position and Business Systems Coordinator have eligible staff that can be promoted from within.
- Continued cross training of staff within each division by supervisors to prepare them for possible promotion from within.
- For entry positions needing to be filled from the outside, continue to utilize exercises to test eligible candidates to assure that their current skill sets meet what is required of the positions.



# Recruitment Challenges

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**Job titles that present a current recruitment concern and what approaches the department is taking to address these concerns. Provide information relative to your plan for recruiting diverse candidates.**

- The Teller and Customer Service Representative III positions are the department's entry level positions.
- Original exams are requested of DER to fill these positions. DER utilizes various means to obtain the largest pool of candidates to take the exams.
- The department would like greater flexibility in hiring temporary employees to permanent positions. The department uses temporary employees throughout the year during its busiest times. The ability to hire a temporary employee that is already trained and has proven to be a successful employee would lessen the burden on staff that is already overworked due to the vacancy.

# Action Plan

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**Three goals the department will focus on and an explanation of how the department will achieve that those goals.**

- Implement stay interviews - The department plans to implement annual “stay” interviews with all employees by the end of 2020.
- Implement flexible schedules - The department would like to implement flexible schedules. Options include early start and end times, later start and end times, and four 10 hour days. Work with DER to address the challenges that may include how sick leave and vacation days can be addressed.
- Work with DER on a plan to address hiring temporary employees into permanent positions.



# Action Plan - Continued

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## Timeline for implementation and roles and responsibilities.

- The action steps would be pursued during the ensuing year by department managers with the cooperation of department staff and DER.

# Jobs with Purpose; Life with Balance

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**Indicate how you believe your organization has demonstrated the above approach.**

The department has always had philosophy of family first. Department staff are encouraged to attend their children's, grandchildren's, and family's celebrations, programs, or sporting events. If time is needed by staff for caregiver duties, accommodations are made to the extent possible.