



# **Creating an Agile Organization**

**A Collaborative Report for the  
County of San Mateo**

**Prepared February 2013**



# Creating an Agile Organization

February 2013

***“Fast Trains to the Pacific: From New York to San Francisco In Four and A Half Days”***

*–New York Times, January 1883*

A rumor that a new train service would slice two days off the ride across the United States was big news in 1883, a year that seemed to divide two eras. The Brooklyn Bridge opened in New York while Black Bart robbed a stagecoach in California. And in Washington, D.C., President Chester A. Arthur signed the Pendleton Civil Service Reform Act, which required that government jobs be awarded on merit, not political connections or contributions.

We can draw parallels between the world in 1883 and our world today. One hundred and thirty years ago innovations in transportation and engineering were sweeping the United States into a new and faster age. The Pendleton Act was, for its time, an innovative response to the increasing demands on and expectations of government.

Today, innovations in technology and communications are changing our lives and the workplace in ways we never imagined only a few years ago. As our world speeds up our County faces changing demands on and expectations of our County government as well as the demands and expectations from the changing workforce. Yet the Pendleton Act and its related regulations and policies still govern much of how our County government functions and the way we deliver services.

Today there are 1 billion Facebook users, 175 million LinkedIn users, more than 200 million Tweets each day and 181.8 million active blogs. Rapid changes in technology and the use of digital media have enabled individuals and communities to connect in new and faster ways. Just ten years ago, a website asked people to volunteer to write an encyclopedia. Wikipedia is now the most widely used reference work in the world.

The Pew Internet Project found that in 2012, 80 percent of adults use the Internet and 66 percent of those online Americans use social networking sites (SNS). And in San Mateo County this is especially true, as the county is considered to be the most “wired” in the nation. As communities become “borderless” and much more interconnected, local government finds itself at the intersection of these changes and innovations which can enable new ways of civic participation, the ability to achieve greater transparency, and offer new opportunities for delivering services if we are committed to harnessing and utilizing these new technologies.

As individuals learn to use the changing technologies, institutions must harness them as well. Our era calls for initiatives that reflect our current world, not the world of 1883. The same innovative thinking that led to the Pendleton Act is needed now if we are to build a financially stable and responsive organization that engages its residents in civic affairs.

*We need to engage the public in the governance of the County, embrace relevant forms of digital communications and technology, be good stewards of fiscal and natural resources and deliver services that meet the needs and expectations of residents.*

Four powerful forces are driving the effort to create an agile organization:

### Workforce Requirements

Recruiting talented and highly skilled employees is more difficult than ever before, especially in a geographic area that offers the wealth of opportunities as the Bay Area. Although the mission of the public sector involves uniquely meaningful work that impacts society and the local community, the time-honored expectation of long-term employment can no longer be the primary incentive for public sector employees in today's rapidly changing political and unstable economic environment. (The County's workforce has contracted by 700 jobs in five years, for instance.)



New, innovative and multi-generational recruitment and workplace strategies will be required to attract a diverse group of employees, some of who may choose to continue working in different roles beyond traditional retirement age. There are many opportunities to take advantage of these workforce changes by encouraging all prospective, as well as current, employees to bring new skills and experiences to public service. New organizational structures and incentive programs that could include: dual career tracks, pay for performance and portable retirement benefits, will be required for a talented workforce of the future.

*The County must remain competitive and attract talented workers by offering a mix of competitive compensation, portable retirement benefits, and meaningful work that impacts society and the local community.*

### Changing Demands/Expectations

Our world has changed and will continue to change dramatically in the coming years. Our residents are among the most tech-savvy in the world: wired or wireless, they are plugged in. They expect to do business – whether buying a book or reaching co-workers across oceans -- 24/7. They expect no less of us. The expanded use of web-based and mobile app-based technology will only drive demand for more convenient self-help options.

*The degree to which the public sector provides solutions and successfully responds to that demand will influence the public's overall satisfaction with the quality of public services.*

### Unpredictable Revenue/Devolution

At the policy level, California's Public Safety Realignment and the Obama Administration's Affordable Care Act are two examples of our rapidly changing environment. Each contains a myriad of regulations that will require changes to our public safety, health care, human services and other programs. At the same time any number of ballot propositions, lawsuits and trailer bills create an umbrella of uncertainty which can mandate a shift in responsibilities overnight. As the lead agency for our entire county in a natural disaster or other crisis, we are expected to respond swiftly and effectively to those in need.

Sequestration. The Fiscal Cliff. Trigger cuts. Changes in unfunded retirement liability methodologies. Bankruptcies (think Lehman Brothers). We are caught in a seemingly endless cycle of boom and bust, yet have little control over these external factors that profoundly impact our budget and, therefore, the services and assistance we are able to provide to residents.

*We need fiscal stability based on long-range financial planning, not short-term, crisis-to-crisis spending plans.*

### Falling Confidence in Government

During the past three decades the public's confidence in government at all levels has declined as cynicism increased. During this time the public has come to view government services through the lens of consumerism. Consumers often have vast choices in the products and services they buy. However, the emphasis on consumerism has tended to diminish the role of citizenship that is characterized by reciprocal rights and obligations to the community.

In the midst of nationwide polls showing a decline in public confidence in the effectiveness of government, we must engage our residents in serious policy deliberations. Engagement of the community will enable us not only to provide the services that they need but to do so in ways that are the most effective in today's fast-paced and ever-changing environment. Engagement also involves more effective communication as to the impact of the services and programs their tax dollars have supported.

*We must involve the public in new and meaningful ways in the governance of the county by engaging them as our partners.*

## **Background**

The County's agility will involve more than just changes to work delivery methods. It will require the alignment of political, human, technological and organizational resources to ensure that our collective efforts produce the intended results for those we serve.

In July 2012, the County formed an Internal Practices Committee and began to assemble a Task Force to identify the goals for redefining how work is accomplished and examine viable work delivery models that would be part of what is now known as "Creating an Agile Organization."

The purpose and focus of these two groups were to provide the Board of Supervisors with a set of high-level recommendations that would enable all County departments to meet their current and future commitments to County residents, in a dynamic environment, effectively and efficiently over the long-term.

The work of dedicated and engaged County employees, and community and business leaders yielded a set of recommendations that are contained within this report.

## **Future Work Delivery Models**

The Task Force recommends implementing the following work delivery models to enhance the organization's agility in meeting service delivery needs. These models would apply to future staffing and would not impact the employment status of current employees. These models would be utilized in determining how to provide a service (1) when vacancies occur and (2) when new programs/projects are initiated.

<b>Work Delivery Models</b>	<b>Description</b>
<b><i>Regular</i></b>	"Regular employee" refers to employees engaged in high risk fields, policy development or critical decision making who are not employed on a temporary basis and who are not in a probationary status. Implementation of the recommendations in this report would result in fewer employees in this category over time.
<b><i>Term</i></b>	Limited term employment, with salary and benefits (similar to Regular) except a defined contribution plan, rather than a



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	defined benefit pension.
<b><i>Temporary/Extra-Help/Fellows/Paid Interns</i></b>	Short term assignment / fellowships / internships, with benefits.
<b><i>Contractors</i></b>	Community-based organizations, independent contractors, or freelancers
<b><i>Volunteers/Unpaid Interns</i></b>	Citizens providing services ranging from office support to maintenance (clean-ups), non-paid status. This would involve work for which there is no appropriation of funds.
<b><i>Self-Help/Connected Community</i></b>	Helping people to help themselves (Web-based services, vote-by-mail, filling out forms) or community-based services (Neighborhood Watch, Sheriff's Activities League).
<b><i>Shared Services</i></b>	Sharing of resources with local organizations (cities, schools, special districts, non-profits) to enhance cost-effectiveness and/or improve service delivery.

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## **Changes and Investments Required**

Creating an agile organization will require a long-term commitment to change, including:

- Revisions to the County Charter, Civil Services Rules, County Ordinance Code, and other personnel policies and processes
- Fully engage organized labor as partners in this endeavor
- Statutory changes to enable a defined contribution plan
- Continued investment in professional development to keep employees current
- New strategies to attract and fully integrate a multi-generational workforce
- Investments in new technologies and infrastructure

## **Recommended Next Steps**

***"In virtually every organization, regardless of mission and function, people are frustrated by problems that seem unsolvable." – Margaret J Wheatley***

Request Board approval of this report and recommended next steps. These steps are:

1. Meet with all labor organizations and other stakeholders to discuss the relevant implications and changes necessary to implement the approved recommendations.
2. Begin the pilot processes to determine the organizational, operational and employee-related impacts of the application of the work delivery models.
3. Change job descriptions and classifications (where appropriate) to more accurately reflect current tasks, responsibilities and service needs.
4. Develop a dual career ladder for skilled Regular employees interested in upward mobility, but may not be interested in management or supervisory track (including but not limited to some scientific, medical, information technology and engineering positions).
5. Identify new opportunities to use performance-based compensation, term employees, contractors, volunteers, enhanced self-help as well as shared services.
6. Seek Charter Amendments and legislation required to implement recommendations.

The Task Force considered the specific benefits, issues, and impacts of each of the seven recommended work delivery models and developed the following recommendations for follow-up and implementation.

## **I. Regular Employee**

1. Develop a County policy that defines the criteria used by Departments when determining the appropriate type of work delivery model for new tasks and when vacancies occur.
2. Continue to invest in the professional development of employees to ensure skill sets current and relevant, and incorporate appropriate employee engagement strategies to maintain loyalty and commitment.

## **II. Term Employee**

1. Revise the County Charter, Civil Service Rules, County Ordinance and County Employee/Employer Relations Policy so that the Term employee description encompasses all employees who would be hired for a minimum duration of six (6) months and are not appointed to a Regular position.
2. Specify the duration of Term appointments based on program, project, service or event completion, or a determination that the assignment has achieved its desired outcomes

or is no longer needed. Include the establishment of a method and/or policy to allow for the renewal of these appointments.

3. Pursue required statutory changes that would permit the establishment of a defined contribution retirement plan that meets all applicable federal and state requirements and would only be available to employees in this category.

### **III. Temporary/Extra-Help/Fellows/Paid Interns**

1. Research the viability of raising the 1040 hour limit for all short-term employees in order to allow more flexibility, with fewer time constraints, for departments to effectively cover additional workload needs created by peak demands, special projects and/or employee absences or vacancies.
2. Create an appropriate compensation and benefits structure that will attract qualified fellowship applicants.
3. Provide short-term employees health care options consistent with Federal Health Care Reform. Research options to provide these employees an opportunity to purchase group health insurance after 160 hours of temporary employment.
4. In 2013 initiate the County Manager's Office, "Policy, Innovation and Engagement Fellowship Program" pilot; evaluate and scale the fellowship to 10-fellow cohort in 2014 to more fully utilize recent college graduates in policy and professional work throughout the organization.
5. Create "encore" opportunities for retiring workers to reinvent their careers. One focus could be on how to assist soon to be retirees to transfer their knowledge and experience to County workers. Another opportunity could be in creating encore internships that are designed for people who want to work beyond normal retirement age that want to continue working and are motivated by public service.

### **IV. Contractors**

1. Seek Charter Amendments to implement recommendations.
2. Develop strategies to expand the pool of qualified contractors through the use of social media and County participation in targeted professional organizations and forums.
3. Create a contracts database that includes information about contractors currently providing services to the County enhancing the ability to share and attract new resources within and to the County.

### **V. Volunteers/Unpaid Interns**

1. Establish a centralized volunteer program using best practices. Expand the use of volunteers throughout the organization using the Human Resources (HR) Department to provide support in the areas of outreach, marketing, recruitment, reporting, tracking of hours, and all other administrative and coordination functions.



## **VI. Self-Help/Connected Community**

1. Identify ways to assist the public in becoming more involved in the self-delivery of certain services with technology and improve customer and client access.
2. Evaluate pilot with Code for America to determine the feasibility of expanding mobile applications and other technology solutions to enhance services that address community needs.
3. Leverage learning by developing “creation spaces” that enable the formation of interactive teams, peer-to-peer networks that expand knowledge-sharing and knowledge creation across teams.
4. Develop strategies that foster volunteers, online access and assistance to services.
5. Launch an initiative to develop strategies that engage residents in local governance through new technologies and by building new relationships. This will involve creating platforms for exchanging ideas and information on social media and engaging residents in online communities and networks.

## **VII. Shared Services**

1. Review existing partnerships with local municipalities, non-profits, joint power authorities and school and college districts and explore opportunities to expand the relationships and leverage County resources in order to achieve greater economies of scale.
2. Develop partnerships through the use of technologies that support new shared services opportunities.
3. Choose one significant service in each department and implement a pilot program with a partner agency to determine if it is sustainable.

## **Pilot Projects**

The initial pilot projects planned for 2013:

### County Manager’s Office - Policy, Innovation and Engagement Fellowship Program

The County Manager’s Office is beginning a Policy, Innovation and Engagement Fellowship program in early 2013 for recent college graduates to work as part of a team and undertake policy and professional work assignments. The fellowship projects will be focused on innovation strategies to improve engagement and community participation and include the use of social media outreach tools to enhance the County’s online presence.

#### County Manager's Office - Nextdoor

"Nextdoor" is a neighborhood information sharing platform for the unincorporated communities in San Mateo County that will be available in late 2013.

#### County Manager's Office - Mindmixer

"Mindmixer" is an online community issues discussion platform that will go live in 2013 and can be found at [www.SMCSPEAKOUT.com](http://www.SMCSPEAKOUT.com).

#### Information Services Department (ISD) – New/Replacement Business Systems

ISD's proposed model for new/replacement business systems recognizes the ramp-up and staffing flexibility needed for multi-year IT projects, and base level of core ongoing support once the projects are completed. This model could also apply to fixed-term pilot projects in other parts of the County organization, to allow time for ramp-up and evaluation of innovative programs before determining if they should be integrated into core operations (e.g., prevention and early intervention pilots).

#### Parks Department – Organizational and Service Delivery Review

In the upcoming year, the Parks Department will review its organizational structure and assess how services are delivered. This review will provide an opportunity to explore the application of the various recommended work delivery models as additional resources/staffing are anticipated.

#### Human Resources Department (HR) – HR Technician Generalist Model

HR will pilot a new generalist model for HR Technician classifications using Term employees. These positions will support various service areas including recruitment, training, and employee and labor relations. It is anticipated that HR Technicians will gain broader experience that will prepare them for future promotional opportunities. A program description will be finalized in mid-2013 and recruitment will be conducted shortly thereafter.

### **Proposed Implementation Schedule**

March 2013	Seek Board Approval for "Creating an Agile Organization" recommendations
March/April 2013	Engage stakeholders
April – August 2013	Comprehensive analysis to determine statutory, rules and policy revisions
May 2013	Submit report on planned tactics to further engage residents in local governance

September 2013	Ramp-up pilot projects
February 2014	Evaluate and report pilot results
September 2014	Scale-up changes across the organization

## Appendices

### Internal Practices Committee

The Internal Practices Committee (“committee”) was formed in July 2012 and included a cross-section of management staff from various departments within the organization. The committee was supported by Jim Delia of Delia and Associates.

The members are:

John Maltbie, County Manager  
David Holland, Assistant County Manager  
Reyna Farrales, Deputy County Manager  
Peggy Jensen, Deputy County Manager  
Mary McMillan, Deputy County Manager  
Marshall Wilson, CMO Communications Director  
Shanna Collins, CMO Management Analyst  
John Beiers, County Counsel  
Paul Okada, Chief Deputy County Counsel  
Donna Vaillancourt, Human Resources Director  
Rocio Kiryczun, HR Administrative Services Manager  
Srija Srinivasan, Health Director of Strategic Operations  
SaraT Mayer, Director of Health Policy and Planning  
Mark Wyss, Captain, Sheriff’s Office

The committee first met in late July to identify and consider the pros and cons of the existing staffing structure to help inform and plan for the exploratory phase of the “Creating an Agile Organization” effort. The committee also conducted a SLOT’s (Strengths, Limitations, Opportunities and Threats) review of the current organizational/employment environment and identified the following topics for consideration: Department Operations; Compensation and Benefits; Policies, Processes and Procedures; Employee Recruitment, Retention and Turnover; Political Climate; Labor Agreements; Performance Management; Financial; Organizational Capability; Skills and Competence; Service Delivery; and Sustainability.

The committee identified the following vision and goals at the outset of the process:

*Design a flexible, inclusive and financially sustainable staffing structure that will attract and retain a diverse and talented workforce that can thrive in a dynamic environment, continually explore collaborative partnerships with other entities, and consistently deliver effective and efficient services to County residents.*

- 1. Maximize our ability to meet the Shared Vision 2025 community outcomes of healthy, safe, livable, prosperous, environmentally conscious and collaborative with the resources available;*
- 2. Ensure that evolving public needs are addressed in a responsive manner;*
- 3. Leverage opportunities for partnership with other entities/ organizations working toward common goals;*
- 4. Create opportunities for residents to interact with the County to help shape policy decisions;*
- 5. Promote an organizational culture of continuous learning, collaboration, process improvement, and service orientation; and*
- 6. Attract and retain a diverse talent pool that has the breadth of skills, expertise, flexibility and adaptability necessary to provide excellent service to the public*

Various members of the committee met regularly throughout the process to review the data that was collected after each phase and to provide staff support to the larger Task Force.

General updates regarding the committee's progress were given to labor organizations at the monthly Labor/Management Structural Budget Deficit meetings. Updates were also provided to the County Executive Council.

## **Task Force**

The Task Force was composed of a cross-section of community and business leaders, along with the members of the Internal Practices Committee.

The external members include:

Jayne Battey, Managing Director of Miramar Environmental, Inc  
Michael Brownrigg, Burlingame City Council Member  
Michael Garb, Retired CEO, Star Vista  
Mike Garvey, Retired Public Administrator

Bob Hortop, Vice President of Strategic Development, Mills Peninsula  
Audrey Ng, San Mateo/Foster City School Board Member  
Seren Pendleton-Knoll, Youth Commission Program Coordinator/StarVista  
Seth Rosenblatt, President, SMC School Boards Association

The Task Force first met in late September 2012 to discuss the purpose, role and goals of the group. The meeting also included presentations that provided members an opportunity to learn more about the changes that were already occurring within the County and to hear how other organizations are responding to some of the broader demographic, social and political changes taking place. The presentations included remarks by Paul Saffo, a technology forecaster and a San Mateo County resident. He described the relevant future trends and encouraged participants to “borrow bits and pieces from other organizations” and “not get trapped by short-term solutions for the long term.” Finally the group identified and discussed the significant issues that might affect the achievement of the goals for the “Creating an Agile Organization” effort.

The Task Force had three additional meetings between October 2012 and January 2013 to analyze the data collected and to provide feedback and direction to the Internal Practices Committee members regarding the proposed work delivery models and related criteria for the application of each model. The Task Force was also instrumental in identifying the advantages and challenges associated with each of the work delivery model and in providing guidance throughout the process of developing the *Recommendations for Follow-up/Implementation* that are contained herein (p. 7-9).

## Data Collection

The Internal Practices Committee and the Task Force determined that data should be gathered from the following sources:

1. Systematic Review (see Exhibit “A”)
2. Internal Practices Survey (See Exhibit “B”)
3. External Practices Survey (See Exhibit “C”)

### 1. Systematic Review

Internal Practices Committee and Task Force members reviewed existing literature, articles, case studies and websites to identify relevant information to be considered. The design of the systematic review was guided by the purpose and goals of the overall process. The scope of the review was broad and was not limited to public sector strategies and practices. The review covered the following work delivery models and related topics:

- Workforce trends and staffing models
- Fixed Term employment and “up or out” concept (e.g., Military)
- Volunteers and Interns
- Fellowships

- Contracts/Contractors/Managed Competition
- Shared Services
- Competencies for a 21<sup>st</sup> Century Workforce
- Incentive based compensation

In addition, a review of existing staffing practices within the County was conducted, including examining Charter, Civil Service Rules, County Ordinance, and other policies relating to personnel (Exhibit “D”). The Internal Practices Committee also developed a set of questions designed to help explore the range of potential impacts that may result from the selection of any one of the work delivery models (Exhibit “E”).

## 2. Internal Practices Survey

An online survey was sent to all County department heads to gain insight into how work was being accomplished at the department-level and to identify any staffing approaches that have been working well and that could potentially be applied in other areas of the organization.

Departments provided information on how they have been utilizing part-time employees, temporary/extra help, contractors, fixed term employees, volunteers, and interns to meet their service delivery needs. Respondents indicated that all employ full-time employees, all have temporary/extra help employees, over 70% hire contractors, and 50% have interns and volunteers.

### Key Findings

Departments are interested in:

- More flexibility in the ability to use various staffing models
- Additional sharing of resources (for administrative functions)
- Compensation structures that align with the entities with whom they compete for talent
- Expanded use of volunteers
- Additional technology options to assist taxpayers that require less staff assistance and make services and business processes more efficient
- More contractors to assist with projects as needed
- Pay for performance (performance-based compensation)

## 3. External Practices Survey

An online survey was sent to external leaders through the International Personnel Management Association for Human Resources (IPMA-HR) and the Alliance for Innovation to determine the extent to which they have been using alternative staffing models. Ten (10) agencies responded to the survey including: Multnomah County, OR; City of Charlottesville,



VA; City of Phoenix, AZ; City of Virginia Beach, VA; City of Lake Oswego, OR; Pierce County, WA; City of Dallas, TX; City of Los Angeles, CA; City and Borough of Juneau, AK; and Metro, OR. In addition to the online survey, outreach was made to the County Personnel Administrators Association of California (CPAAC) about their workforce strategies.

### Key Findings

Public sector organizations that were surveyed follow similar staffing strategies and practices to those that are under consideration as part of this initiative, including:

- Wide spread use of contractors and temporary employees
  - The most common services that are contracted out are in Information Technology (IT), Building Services, and Construction
- Some use of “Fixed Term” employment
  - Multnomah County hires fixed term employees (who have full benefits) for short term or grant-funded projects.
  - Many of the fixed term employees are found in the IT area.
- Several organizations have robust volunteer programs
- Many organizations are also exploring means to leverage technology and create opportunities for self-help services

Information obtained from these external organizations was helpful in the development of the recommended work delivery models.

## Recommended Work Delivery Models

A goal of this initiative is to offer departments an expanded array of employee classification types and community resources that will allow the County to continue to design sustainable service delivery models that provide excellent services to the public. Over the course of this study, seven (7) work delivery models were identified and examined. The recommendations that follow would be applicable for future staffing and organizational decisions and not affect the employment agreements with existing County employees.

The work delivery models include:

1. Regular Employee
2. Term Employee
3. Temporary/Extra-Help/Fellows/Paid Interns
4. Contractors

5. Volunteers/Unpaid Interns
6. Self-Help/Connected Community
7. Shared Services

Overall, decisions about service delivery structure should be made within the context of many factors, including the end goal for the service (who should receive the service, and at what level), what models for delivery already exist, relative positioning of the County with other stakeholders and partners, budget, administrative complexity, and alignment with other services.

The recommended work delivery models are described and organized below under the following categories:

<b>Background/ Criteria</b>	Brief summary and general overview of the purpose, features and benefits of the work delivery model; and organizational conditions, needs and priorities to be considered that include relevance, effectiveness, efficiency and utility.
<b>Compensation/ Fiscal Impact</b>	Wage and salary payments as well as benefits including health and life insurance, performance-based compensation, retirement payments, and any other non-cash compensation; and estimated costs associated with the work delivery model that could increase or decrease County expenditures.
<b>Advantages</b>	The expected or potential benefits of continuing, adding or changing the work delivery model.
<b>Challenges</b>	Factors that may affect the viability or the successful implementation of the work delivery model.
<b>Example</b>	An illustration of how this work delivery model could be used by a representative department.

## I. Regular Employee

### Process for Determining Regular Model

The criteria are: Organizational Risk, Policy Level Work, Critical Decision Making, Health and Safety, Management/Supervisory Responsibility, Continuity/Institutional Knowledge, Training Requirement, and Market Value of Critical Skills.

The criteria is separated into two categories (Level One and Level Two), as labeled below. A detailed description of the criteria is attached as (Exhibit "F").

<b>Background/ Criteria</b>	<p>The Regular employee description would be changed to be more narrowly defined so that it is used more deliberately and not treated as an automatic, or first choice, staffing model when vacancies occur.</p> <p>The work must be done by a County employee, according to the County Charter or other legal and financial requirements; and the work must meet at least one Level One work criteria or at least three Level Two work criteria:</p> <p><i>Level One</i></p> <ul style="list-style-type: none"> <li>• Organizational Risk</li> <li>• Policy</li> <li>• Critical Decision Making</li> </ul> <p><i>Level Two</i></p> <ul style="list-style-type: none"> <li>• Health and Safety</li> <li>• Management/Supervisory Responsibility</li> <li>• Continuity/Institutional Knowledge</li> <li>• Training Requirement</li> <li>• Market Value of Critical Skills</li> </ul> <p>Work assigned to these employees is subject to ongoing, periodic reviews to determine whether the service delivery model needs to be redesigned.</p>
<b>Compensation/ Fiscal Impact</b>	<p>An employee's salary would be defined by the employee classification. Full benefits and a defined benefit retirement plan would be included as part of the compensation package. Performance-based compensation could also be included. Under the current retirement system, the employer (County) bears the full cost of any unfunded pension liabilities, which can increase significantly if investment earnings are not achieved. It is anticipated that earnings assumptions will be lowered over time from the current 7.5%. This will significantly increase the County's annual required contribution.</p>
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Increases ability for departments to address financial challenges by strengthening the requirements for appointing a fully benefitted Regular employee to fill a vacancy.</li> <li>2. Ensures the continuity of service, professional and community relationships, and institutional knowledge and memory by encouraging the strategic placement of key employees as needed.</li> </ol>

	<ol style="list-style-type: none"> <li>3. Maintains easy mobility and job transfer for qualified candidates who are already employed by the County.</li> <li>4. Structured to be competitive in attracting top talent that may be desired by other counties/local governments with which we compete.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Application of the strengthened criteria for appointing Regular employees must be consistent across departments.</li> <li>2. The process by which to apply the hiring criteria and establish a cap for the number of Regular employees Countywide must be clearly defined to ensure consistency and long-term financial sustainability.</li> <li>3. Morale issues within departments may occur as a result of employees working side-by-side who are in different retirement systems.</li> <li>4. Criteria may favor management over line staff and therefore could reinforce existing tensions between management and staff.</li> <li>5. The transparency of public sector compensation may create unintended morale issues among co-workers when performance-based incentives are introduced.</li> <li>6. Limitations and/or restrictions may be contained in the current County Charter, Civil Service Rules, County Ordinance and County Employee/Employer Relations Policy.</li> </ol>
<b>Example</b>	<p>A Social Worker position in Child Protective Services is an example that would meet the criteria since the work involves <i>organizational risk, critical decision making, health and safety, training requirements, and the continuity/institutional knowledge to effectively perform duties</i>. These positions involve highly skilled casework that provide social services for neglected, abused, dependent or exploited children and their families in order to preserve the children's own home when possible, or by substitute care such as shelter care, foster homes or institutions.</p>

## II. Term Employee

<b>Background/ Criteria</b>	<p>The expanded use of the Term Employee work delivery model would promote greater agility and adaptability to the changes the County increasingly faces in delivering public services in an effective and efficient manner. The limited-term nature of the Term Employee model could increase the County's ability to attract talented individuals, at an experienced level or entry level, who are focused</p>
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	<p>more on short-term employment objectives and are not necessarily seeking a long-term employment commitment. The Term Employee model could also serve as a link to the Regular Employee model, if and when there is a need, and as more relevant experience is acquired. The model would be used when:</p> <ul style="list-style-type: none"> <li>• Work does not satisfy the criteria described for Regular employees as determined by County policy</li> <li>• Work is projected to last at least six (6) months, to a maximum of 5 years</li> <li>• Work is of a nature in which turnover in the workforce is helpful in meeting current work goals</li> <li>• Work is limited-term because it is a pilot program or project-oriented with specific desired outcomes and objectives with start/finish dates; grant funded, budgeted to eliminate a temporary backlog, or budgeted to address a temporary increase in workload caused by a significant event or initiative</li> <li>• Work benefits from a continual cycling of new ideas/perspectives from outside of County government</li> <li>• Work is part of a formal apprentice or trainee program that helps employees build skills, competence, and relationships over time</li> <li>• Work is of a nature that competes with organizations that do not grant pensions to their employees, and, therefore, skews salary comparisons</li> </ul> <p>Term Employee agreements may contain an “Option to Renew,” as determined by County management. Work assigned to these employees is subject to ongoing, periodic reviews to determine whether the service delivery model needs to be redesigned.</p>
<b>Compensation/ Fiscal Impact</b>	<p>An employee’s salary would be defined by the employee classification which in some instances could be greater than that of a Regular Employee. Full benefits and a defined contribution retirement plan would be included as part of the compensation package. Performance-based compensation could also be included. The defined contribution limits the County’s obligation to its portion of contributions.</p>
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Increases flexibility for departments to fill vacant positions when needed.</li> </ol>

	<ol style="list-style-type: none"> <li>2. Reduces County long-term liability costs due to limits in pension contributions.</li> <li>3. Increases ability to follow best practice recruitment timelines and prepare for filling positions that have high turnover.</li> <li>4. Increases ability to continually attract, retain, and turnover when necessary, a diverse talent pool with current skills, expertise and ideas.</li> <li>5. Positions County to more successfully compete for staff who value current salary vs. lifetime pension by opening compensation review to reflect market salary dynamics.</li> <li>6. Eliminates the adverse consequences of displacement (bumping).</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Required departmental knowledge must be exchanged effectively.</li> <li>2. Morale issues within departments may occur as a result of employees working side-by-side who are in different retirement systems.</li> <li>3. The transparency of public sector compensation may create unintended morale issues among co-workers if performance-based incentives are introduced.</li> <li>4. Contingency plans must be developed to mitigate the risk of Term employees leaving their positions for a new job before their assignment is completed.</li> <li>5. Job market conditions will fluctuate and will affect the ability to recruit qualified candidates at the time they are needed.</li> <li>6. Impact of the learning curve and training requirements for employees in some positions may affect productivity and customer service.</li> <li>7. Limitations and/or restrictions may be contained in the current County Charter, Civil Service Rules, County Ordinance and County Employee/Employer Relations Policy.</li> </ol>
<b>Example</b>	Pest Detection Specialist positions in the Department of Agriculture, or some Environmental Health Specialist positions in Environmental Health, would fall under this category when the services and funding are for a specified duration.

### III. Temporary/Extra-Help/Fellows/Paid Interns

<b>Background/ Criteria</b>	The Temporary/Extra-Help/Fellows/Paid Interns work delivery model is already used by County departments. In the future, the Fellowship/Paid Intern model could be used more widely across
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	<p>departments to attract individuals who are new to local government, to careers with the County. Fellowships/Paid Internships can also include experienced professionals who are relaunching their careers after a hiatus (like full-time parenting). The Harvard Business Review, in a related November 2012 article, refers to this type of employment as “returnships.” The model would be used when:</p> <ul style="list-style-type: none"> <li>• The assignment, workload or project is not expected to last more than one year, or is intermittent from year to year</li> <li>• There is a need to temporarily backfill for a Regular or Term employee who is on leave</li> <li>• There is a temporary peak workload</li> <li>• The work involves intermittent (irregular) or seasonal (recurring annually) work schedules</li> </ul> <p>The use of fellowships could also be expanded to include newer as well as seasoned workers. Fellowships could last more than 1 year. Work assigned to these employees is subject to ongoing, periodic reviews to determine whether the service delivery model needs to be redesigned</p>
<b>Compensation/ Fiscal Impact</b>	Employee salary is based on an hourly rate and benefits are limited to a defined contribution health plan that an employee may or may not elect to pay for. Hourly rates are competitive. Performance-based compensation could also be included. No retirement benefits.
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Streamlines recruiting processes to respond to immediate workload or position needs.</li> <li>2. Increases professional opportunities for skilled students and experienced workers of all ages who are may be new to public service and bring new insights and approaches to the work.</li> <li>3. Provides more opportunities to evaluate work performance and determine if an employee enjoys County employment and is suitable for a Regular or Term position.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. An appropriate level of commitment and reliability must be ensured.</li> <li>2. The learning curve and training requirements for employees in some positions may affect productivity and customer service.</li> <li>3. The transparency of public sector compensation may create unintended morale issues among co-workers when performance-based incentives are introduced.</li> <li>4. Limitations and/or restrictions may be contained in the current County Charter, Civil Service Rules, County Ordinance and County Employee/Employer Relations Policy.</li> </ol>

<b>Example</b>	Short-term or seasonal workers, such as Library Aides, Park Aides and Election Workers would fall under this category.

#### IV. Contractors

<b>Background/ Criteria</b>	<p>The Contractor work delivery model is presently used by County departments. The category consists of Community Based Organizations, Independent Contractors and Freelancers. Depending upon the requirements of the assignment, the work performed may be done onsite or virtually. Due to the increase in connectivity and available technology, experts predict a steady increase in the number and type of knowledge workers who prefer the flexibility and independence of working as a contractor as opposed to an employee. The model would be used when:</p> <ul style="list-style-type: none"> <li>• Work requires unique expertise that is available in the private market; or</li> <li>• Amount of work needed is more effectively/efficiently managed by a contracted entity or individual for which/whom the County's needs can be combined with other clients in a shared services model; or</li> <li>• External entities are better positioned than the County to deliver work in an effective and efficient manner (i.e. rapid pace of changing technologies or skills); or</li> <li>• External entities have developed a unique competence with a target population or service area that the County is unlikely to be able to achieve</li> </ul> <p>Work assigned to these contractors is subject to ongoing, periodic reviews to determine whether the service delivery model needs to be redesigned</p>
<b>Compensation/ Fiscal Impact</b>	Payment (via invoice) based on scope of work. Typically contractors are paid according to a schedule, e.g., one payment at the beginning of a project and another upon completion. Contractors are self-insured. Under a performance-based contract, the County would only

	pay the contractor when specific milestones and performance objectives are met.
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Can be utilized as services are needed, expanding flexibility to meet service needs.</li> <li>2. Increases external perspectives to current problems.</li> <li>3. Requires limited supervision as the assignments are based on outcomes.</li> <li>4. Allows for the utilization of virtual workers with specific skill sets who reside outside normal commuting distances, even across the globe.</li> <li>5. Reduces County short and long-term liability costs due to lack of benefit payments and pension contributions.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Contractors may have additional outside projects and may have less commitment than an employee.</li> <li>2. Rates may vary by project and overall market demand.</li> <li>3. Job market conditions will fluctuate and will affect the ability to recruit qualified contractors at the time they are needed.</li> <li>4. There may be less collaboration with virtual co-workers due to the lack of regular, social contact.</li> <li>5. Limitations and/or restrictions may be contained in the current County Charter, Civil Service Rules, County Ordinance and County Employee/Employer Relations Policy.</li> </ol>
<b>Example</b>	An individual under a contract to provide systems development consultation would fall under this category.

## V. Volunteers/Unpaid Interns

<b>Background/ Criteria</b>	<p>Volunteers offer services (at no cost) to departments throughout the organization, including the Library, Public Works and Parks, and Sheriff's Office. The services provided range from seasonal to year-round and may include office support, outreach, and maintenance services. Currently all volunteer coordination is handled by departments. The model would be used when:</p> <ul style="list-style-type: none"> <li>• The work is not budgeted (funding is not available)</li> <li>• The work involves low financial or legal organizational risk</li> <li>• The work provides an opportunity for citizens to engage with the County and community</li> <li>• The work does not replace existing staff</li> </ul>
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	Work assigned to these employees is subject to ongoing, periodic reviews to determine whether the service delivery model needs to be redesigned.
<b>Compensation/ Fiscal Impact</b>	No compensation. (Note: Volunteers may receive other incentives: training/workshops, award recognition programs, luncheon/ceremonies, etc.). County incurs costs for staff who supervise volunteers, and any reimbursements for minor expenses.
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Engages and involves citizens in the County.</li> <li>2. Provides opportunity for volunteers to make connections.</li> <li>3. Expands service delivery with minimal to no cost.</li> <li>4. Allows for greater transparency of County operations to the public.</li> <li>5. Increases opportunities to learn new skills and become more marketable, especially for individuals who are just entering, or are re-entering, the workforce.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Recruitment (finding and retaining volunteers).</li> <li>2. Time required supervising volunteers.</li> <li>3. Resources needed to manage a comprehensive County-wide program.</li> <li>4. Potential insurance liability and associated costs.</li> <li>5. High turnover and associated time and costs of retraining.</li> <li>6. Potential that some full-time staff could feel threatened by volunteers.</li> </ol>
<b>Example</b>	A Public Works/Parks Volunteer who assists with neighborhood clean-ups, habitat restoration, trail maintenance, shoreline clean-up, docent tours, and visitor center support would fall under this category.

## VI. Self-Help

<b>Background/ Criteria</b>	<p>The Self-Help work delivery model typically would involve the use of web-based and/or mobile app-based technology (on demand service) and is intended to improve the connectivity to the public, rather than to be used as an alternative staffing consideration.</p> <p><u>Examples:</u> Vote by mail, online property tax bill pay, self-check-in/out at the library, online government assistance, eligibility applications, online access to frequently requested information, and neighborhood watch groups organized using social media. The</p>
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	<p>model would be used when:</p> <ul style="list-style-type: none"> <li>• It is determined that a service would be more convenient, available and cost-effective if it were accessible online</li> <li>• Cost-savings opportunities exist that would maintain or improve existing or planned services</li> <li>• The County does not want to provide, or is not able to continue providing, a service to the public</li> <li>• It is more effective and efficient for County staff to support partners to deliver a service previously provided by County staff</li> </ul>
<b>Compensation/ Fiscal Impact</b>	No compensation. County expense would be incurred to support kiosks and other self-help tools.
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Efficient, streamlined processes would minimize administrative workload.</li> <li>2. Expands convenience to the public through on-demand services.</li> <li>3. Increases community engagement by encouraging citizen-partners.</li> <li>4. Reduces some employee tasks and assignments and would allow for staff time to be redirected to duties that are more complex or of higher value.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Public may disagree on which services should be designed as self-help and may disagree on the level and quality of some designated services.</li> <li>2. Some service needs may not be adequately met for clients and customers who do not have access to the required technology or lack the necessary technical proficiency.</li> <li>3. One-time costs for information technology purchases may be significant.</li> <li>4. May displace the employees who are currently providing the service that is being transitioned to a self-help delivery model.</li> </ol>
<b>Example</b>	A consolidated payment center in the Treasurer's Office allows for payments to be sent directly to the County's bank for processing which results in County staff being able to focus on customer service rather than opening mail.

## VII. Shared Services

<b>Background/ Criteria</b>	<p>This model involves sharing of resources (internal and external) with local municipalities, non-profits, joint power authorities and school and college districts to deliver cost-effective and efficient services. The sharing could include staff, real estate (owned or leased), equipment or organizational structure. The model would be used when:</p> <ul style="list-style-type: none"> <li>• Cost-savings opportunities exist that would maintain or improve existing or planned services</li> <li>• There is a demonstrated need or interest expressed by an existing or potential service partner</li> </ul>
<b>Compensation/ Fiscal Impact</b>	Depending on the arrangement, the County could incur no increase in existing costs, pay a portion of costs or receive revenue for providing the shared service.
<b>Advantages</b>	<ol style="list-style-type: none"> <li>1. Opportunity to maximize resources by taking advantage of economies of scale to achieve cost savings.</li> <li>2. Potential to eliminate redundancy of services and expand the delivery reach across a broader customer base.</li> </ol>
<b>Challenges</b>	<ol style="list-style-type: none"> <li>1. Perception of loss of identity, local control and decision-making by some stakeholders.</li> <li>2. Perception of who is in control by the public.</li> <li>3. Impact on budget and operational flexibility.</li> <li>4. Impact on current departmental policies.</li> <li>5. Increased focus on coordination and collaboration between stakeholders.</li> <li>6. Unforeseen cost implications (e.g., retirement liability).</li> <li>7. Cost of training new staff.</li> <li>8. Sharing some services that require less than full time equivalent hours (FTE) may not result in labor cost savings if the position still needs to be filled full time in order to be available for other tasks and services.</li> <li>9. Potential to cause conflicts between parties, increasing legal costs.</li> </ol>
<b>Example</b>	Police services provided to various cities (San Carlos, Millbrae, and Half Moon Bay) and the Regional Training & Development Consortium for Public Agencies are examples of agencies pooling their resources to provide cost-effective services.



**Systematic Review**

- “Implementing an Agile Talent Management Strategy: The Perfect Model for a Crazy Economy” (December 2009) Dr. John Sullivan
- “Future Work Skills 2020” Institute for the Future for the Apollo Research Institute (2011)
- “What’s the Future of Local Government? An Alliance White Paper Intended to Provoke a Needed Conversion” Alliance for Innovation (January 2011)
- “Approaches to Delivering Best Value Services” City of Carlsbad (July 2011)
- “Thinking Strategically in Trying Times” CSAC Institute, Rich Callahan, USF (material from Robert Biller, USC)
- “The Third Wave of Virtual Work”, Tammy Johns and Lynda Gratton, Harvard Business Review, January-February 2013
- “The 40-year-old Intern”, Carol Fishman Cohen, Harvard Business Review, November 2012

In addition various articles and websites relating to term employment, fellowships, performance based compensation, training/skill building, and contract services were reviewed. Taskforce members contacted various organizations to learn about their best practices, including PG&E and several local governments.

**Creating an Agile Workforce  
Internal Practices Survey**

**1. Department/Contact Information:**

**2. What type of work (i.e. administrative, project-oriented, maintenance, technology, client services, analysis, etc.) do you assign, or have you assigned, to any of the following staff categories? (List as many work types as apply)**

	<b>Type of Work (provide examples/details)</b>
<b>Part-time Permanent</b>	
<b>Temporary (Extra Help)</b>	
<b>Short Term Contractors (less than one year)</b>	
<b>Long Term Contractors (more than 1 year)</b>	
<b>Fixed Term Employees</b>	
<b>Volunteers</b>	
<b>Interns</b>	
<b>Other (Identify)</b>	

**3. What is the approximate percentage of your work that is performed by the following categories?**

- Full-time Permanent employees \_\_\_\_%
- Part-time Permanent employees \_\_\_\_%
- Temporary (Extra Help) \_\_\_\_%
- Contractors \_\_\_\_%

**4. Please add any additional thoughts, comments or reflections on staffing strategies used by your department.**

*\*Survey distributed to all County departments via SurveyMonkey.*

**Creating an Agile Workforce  
External Practices Survey**

- 1. What is the approximate number of employees in your organization?**
  
- 2. What staffing strategies do you use to perform each of the following types of work? (Check all those that apply)**

	Full-time Permanent	Part-time Permanent	Temporary (Extra Hire)	Short Term Contractors (less than 1 year)	Long Term Contractors (more than 1 year)	Fixed Term	Volunteers	Interns	Other
Accounting and Finance									
Administrative Support									
Building Maintenance									
Business/Systems Analysis									
Construction									
HR Support									
Health Services									
Information Technology									
Law Enforcement									
Parks Maintenance									
Social Services									
Other									

- 3. What other staffing strategies are you using or considering?**
  
- 4. Please add any additional thoughts, comments or reflections on staffing strategies at your organization.**
  
- 5. What is the approximate percentage of your workforce who are classified in each of the following categories?**
  - Full-time Permanent \_\_\_\_%
  - Part-time Permanent \_\_\_\_%
  - Temporary (Extra Hire) \_\_\_\_%
  - Contractors \_\_\_\_%
  
- 6. What is the approximate percentage of your employees who are represented?**

\_\_\_\_\_ %

**Contact Information:**

**Name**

**Title**

**Organization**

**Phone #**

**Email address**

*\*Survey distributed via SurveyMonkey.*

*San Mateo County Laws/Rules/Policies Governing Personnel*

<i>County Charter Articles 501-508</i>	<i>Civil Service Rules</i>	<i>County Ordinance Title 2 Administration, Article 2.7</i>	<i>Employee/Employer Relations Policy</i>
<ul style="list-style-type: none"> <li>• Merit basis</li> <li>• In conformance with EEO</li> <li>• Classified/Unclassified Service</li> <li>• Civil Service Commission &amp; Rules               <ul style="list-style-type: none"> <li>○ Standardization of positions</li> <li>○ Examination</li> <li>○ Eligible lists</li> <li>○ Certification of lists</li> <li>○ Probationary Periods</li> <li>○ Temporary Appointments</li> <li>○ Demotion, Reduction in Force, Reemployment, Suspensions, Discipline</li> </ul> </li> <li>• Disciplinary Action</li> <li>• Hearings and Appeals</li> <li>• Compensation</li> </ul>	<ul style="list-style-type: none"> <li>• Classification of Positions</li> <li>• Recruitment</li> <li>• Applications</li> <li>• Examinations</li> <li>• Eligible Lists</li> <li>• Requisition and Certification</li> <li>• Medical Standards</li> <li>• Appointment, Probation, Promotion, Demotion and Transfer</li> <li>• Performance Evaluation</li> <li>• Disciplinary Action</li> <li>• Appeals</li> <li>• Resignation</li> <li>• Reduction in force, layoff, reemployment</li> </ul>	<ul style="list-style-type: none"> <li>• Pay rates</li> <li>• Merit Increases</li> <li>• Attendance and Hours of Work</li> <li>• Overtime</li> <li>• Work Groups</li> <li>• Holidays</li> <li>• Vacation</li> <li>• Sick Leave</li> <li>• Leaves of Absence</li> <li>• Tuition Reimbursement</li> <li>• Outside Employment</li> </ul>	<ul style="list-style-type: none"> <li>• Employee Rights</li> <li>• County Rights</li> <li>• Scope of Consultation and Negotiation</li> <li>• Requests for Registration of Employee Organizations</li> <li>• Establishment and modification of representation units</li> <li>• Certification and decertification of employee organizations</li> <li>• Executive Sessions</li> <li>• Negotiations</li> <li>• Impasse procedures</li> <li>• Unfair employee relations practices</li> <li>• Grievances</li> <li>• Attendance at Meetings by employees</li> <li>• Use of County Facilities</li> </ul>

**Creating an Agile Organization  
Work Delivery Models  
Questions**

We seek to broaden the range of work delivery models to promote greater agility and adaptability to the changes the County increasingly faces in delivering public services in an effective and efficient manner. These models are in a development stage, for consideration for future staffing/organizational decisions, and will not affect existing County employees. Our hope is that an expanded array of workforce types will allow the County to continue to design service delivery models that provide excellent services to the public within the constrained financial resources we must live within. We also hope that new workforce categories position us to better compete for talented individuals for whom County service may be an entry/training or limited duration role but who do not seek to commit to a career in County service. Finally, we hope that greater uniformity in some types of roles across County departments may assist the County in effectively supporting work that is similar across departments.

***Instructions:***

The following questions are designed to help explore the range of potential impacts that may result from the selection of any one of the work delivery models. As each model is considered, review the questions listed and determine which ones apply. Note how the answers to these questions help to clarify how viable the model is for the work it is intended to perform.

**Service Delivery**

- Will the model allow the department to design a service delivery structure that aligns with County needs?
- Will customer service be improved?
- Will service demands be met?
- How will the ability to develop and/or maintain a service-oriented culture be affected?

**Skills and Competence**

- Will this model make it easier to bring in workers with the necessary skills?
- How long will it take to train new staff?

**Employee Recruitment, Retention and Turnover**

- How will it be easier to recruit staff reflective of the community we serve?
- Will it be easier to retain lower seniority, higher performing staff during periods of decreasing budgets as a result of this model?

- How will the recruitment process and cycle time be affected?
- Will this model be more attractive for retirees, experienced private sector employees and/or new graduates?
- Will this model inspire people to want to join the public sector to help others rather than strictly pursue job stability?
- If we lose some employees as a result of this model, can we gain others?
- How does the model affect the goal of achieving a diverse work force?
- How will employee turnover and retention be affected?

### **Department Operations**

- How will this model encourage more flexibility and agility within the operation of the department?
- Will this model enable a quicker response to changing service and operational needs?
- Will this model make it easier to implement comprehensive/strategic policies?
- Will there be an adverse affect on the management of institutional knowledge?

### **Organizational Flexibility**

- Does this model provide the desired flexibility for hiring managers?
- How will mobility within the department and the County be enhanced?
- Will the organizational structure be less complicated as a result of the use of this model?
- Will it be easier to share resources (human) across the department or the County?
- Will the organization be better able to respond to the introduction of new technologies?

### **Performance Management**

- How will this model make it easier to address poor performance?
- How will this model make it easier to reward performance?
- How is succession planning affected?
- Will employees be more or less clear about roles and responsibilities?

### **Financial**

- Can the department use this model to react more quickly to program/budget changes?

### **Organizational Climate**

- Will this model help create a more attractive work environment for individuals new to the workforce?
- Will there be more opportunities for workers to contribute new ideas and fresh perspectives?

- Will more collaboration across departments be encouraged?
- How will employee loyalty and morale be affected?
- How will this model impact employee engagement?

### **Compensation and Benefits**

- How will the use of this model affect potential workers who are interested in making a long-term commitment to the County and are drawn to the stability of long-term employment and benefits?
- Does the model promote livable wages and working standards?

### **Policies, Processes and Procedures**

- Will there be any issues creating regarding fair and equitable employment practices?
- How will existing MOUs be affected?
- Do any sections of the County Charter need to be changed?
- Do any sections of the Civil Service Rules need to be changed?
- What existing departmental policies and procedures may be affected?

### **Consistency**

- How will consistency, standardization and uniformity of services be affected?

### **Political Climate**

- Will there be political resistance to the use of this model?



**Exhibit "F"****Regular Employee - Criteria Definitions**

<b>Level One Criteria</b>	
Organizational Risk	The level of risk associated with the likelihood of occurrence and/or impact of job duties involving financial resources, legal/regulatory/compliance, operations, technology, capital assets, and/or reputation of the County.
Policy Level Work	Responsibility for determining organizational policies and the decision-making associated with those policies
Critical Decision Making	Responsibility for high-level significant decisions that impact the County's financial resources, infrastructure or human resources.

<b>Level Two Criteria</b>	
Health and Safety	Responsibility for the direction, control and implementation of critical health and safety policies, procedures and work practices that affect clients, community members or other workers and employees.
Management/Supervisory Responsibility	Responsibility for directly hiring workers, assigning responsibilities, rewarding and evaluating performance, and approving time records and leave requests.
Continuity/Institutional Knowledge	The demonstrated need for continuity in an assigned position and/or the current level of importance and/or criticality of an individual's job duty knowledge or skills.
Training Requirement	The time and resource investment required to attract, or develop, staff with the appropriate amount of formal or informal training needed to perform specific job duties at the desirable competency level for the period of time necessary.
Market Value of Critical Skills	The value of the uniqueness or the critical skills represented by the potential adverse impact of the loss, and/or the level of difficulty recruiting for the skill set due to specific labor market conditions.