



HR Professionals' Meeting

November 12, 2014

Temporary Exempt (TEX) As-Needed
Category 16 Project Updates

Agenda

❖ Overview

- Micki Callahan and Erik Rapoport

❖ TEX 16 New Justification on RTF

- Shawn Sherburne

❖ Updates of Data from Departmental Review of TEX 16 Employee Use

- Daniella Mattias and Shana Dines

❖ TEX 16 Multiple Head Count Reduction

- Shawn Sherburne

❖ Conversion of TEX 16 99xx Appointments

- Steve Ponder and Shawn Sherburne

Agenda

- ❖ Justification for new 99xx TEX 18
 - Shawn Sherburne
- ❖ Management and Reporting of TEX 1040
 - Melanie Morales
- ❖ Job Experience Crediting (JEC)
 - John Kraus
- ❖ HR Training
 - Shawn Sherburne and Fred Ryan

Overview

- The 2012 Barry Winograd Award
- SEIU's September 2013 Grievance
- SEIU Bargaining 2014
- As Needed Mediation (12/5/14 and 1/7/15) and Arbitration (2/5/15 and 2/23/15)
- Documenting Compliance

TEX16 Justification on RTF

Project Lead: Shawn Sherburne

- Updated Justification codes for TEX 16 Temporary & Seasonal Appointments in Request to Fill (RTF)
- Combined Disasters and Emergency codes
- Added new justification option for “Short-Term Pending PCS Appointment”
- New Justification Code Menu Options:
 1. **Seasonal: consistent, periodic**
 2. **Peak workloads: consistent, one-time**
 3. **Sporadic: inconsistent, on-going**
 4. **Backfill for PCS employees on short-term Leave of Absence**
 5. **Disasters/Emergency**
 6. **New option 6: Appointment in anticipation of a PCS appointment**

EFFECTIVE 11/10/2014

Data from Departmental Review of TEX 16 Employee Use

- Project Leads: Daniella Mattias and Shana Dines
- Review initiated by SEIU information request
- Data obtained from the TEX16 review was evaluated to ensure the appointments are appropriate
- In the event that an appointment was not appropriately justified, the department was asked to move the employee to an appropriate appointment type
- **All transitions must be completed on or before Nov 10, 2014**
- **Data obtained from the review will be provided to SEIU during the week of Nov 17, 2014**

TEX 16 Multiple Head Count Adjustment

- Project Lead: Shawn Sherburne
- Multiple head count cancellation
- Project outcome: Cancel the existing and vacant headcount on multiple head count TEX 16 requisitions
- The cancellation will bring the head count down to current appointments (as of October 24, 2014) plus a 10% cushion rounded up to a full FTE
- Establish a “cap” of no more than 20 as maximum headcount on future requests for TEX 16

EFFECTIVE 11/10/2014

99xx Public Service Aide-Trainee Audit Report

- Who? Recent high school and college graduates to individuals who participate in government assistance programs. In the latter instances, the focus is on providing opportunities to San Francisco residents who may otherwise have barriers to entry into City employment. In some cases, the dedicated program funding is short term, for example, an outside or private grant targeted to a specific population.
- Why? Participants often have little or no work experience and would not otherwise meet the minimum qualifications for permanent City civil service appointments. Generally, it was found that Public Service Trainee positions are effectively used to prepare participants (incumbents), upon successful completion of the training provided by the work experience, to meet the minimum qualifications to compete for entry level civil service position across a broad range of occupational categories -- service, technical, paraprofessional and professional. In other instances, experiences provided through assigned work tasks in the series served to better prepare individuals for employment in the private sector.

Conversion of 99xx and 1322 from TEX 16 to TEX 18

Project Leads: Steve Ponder and Shawn Sherburne

Conversion of all current TEX16 to TEX 18 as of **Nov 8, 2014**:

- 9910 – Public Service Trainee
- 9912 – Public Service Aide – Technical
- 9914 – Public Service Aide – Admin
- 9916 – Public Service Aide – Public Works
- 9920 – Public Service Aide – Assistant to Professionals
- 9922 – Public Service Aide – Aide to Professionals
- 9924 – Public Service Aide – Health Service
- 1322 – Customer Service Agent Trainee

Convert with a schedule-type of “Part-Time/20 or more” hours, and with a TEX Project Category 18 duration through June 30, 2015, unless otherwise requested by the Department.

TEX, AN → TEX, FT/PT

- *Has the employee worked 1040 or more hours in a rolling 12 month period (i.e., has the employee obtained health and retirement benefits and is accruing VA and City SP)?*
 - **Yes** – maintain the benefit service date (BSD)
 - **No** – benefit service date (BSD) should be the same date as the appointment to the TEX, FT/PT position

SEIU, Local 1021 Miscellaneous - Employees who have worked 1040 hours in any consecutive [rolling] twelve (12) month period shall receive all benefits which are provided to permanent employees, including but not limited to retirement, premiums, vacation pay, sick pay, holiday pay and jury duty pay.

Benefit Eligibility by Appointment and Schedule Type

Appointment Type	Full-time		Part-time (≥20 hours per week)		Part-time (<20 hours per week)		As-Needed / Intermittent / Seasonal	
	Permanent Civil Service (PCS, TCS)	Retirement	upon appointment	Retirement	upon appointment	Retirement	upon appointment	NA
Health		upon appointment	Health	upon appointment	Health	never ¹		
Vacation		1yr. cont. service	Vacation	1yr. cont. service	Vacation	1yr. cont. service		
City Sick Pay		6mths cont. service	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service		
Holidays		upon appointment	Holidays	upon appointment	Holidays	depends ^{1,2}		
Permanent Exempt (PEX)	Retirement	upon appointment	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths	NA	
	Health	upon appointment	Health	upon appointment	Health	never ¹		
	Vacation	1yr. cont. service	Vacation	1yr. cont. service	Vacation	1yr. cont. service		
	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service		
	Holidays	upon appointment	Holidays	upon appointment	Holidays	depends ^{1,2}		
Temporary Provisional (TPV)	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths	NA	
	Health	upon appointment	Health	upon appointment	Health	never ¹		
	Vacation	1yr. cont. service	Vacation	1yr. cont. service	Vacation	1yr. cont. service		
	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service		
	Holidays	upon appointment	Holidays	upon appointment	Holidays	depends ^{1,2}		
Temporary Exempt (TEX)	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths	Retirement	1040hrs in a rolling 12mths
	Health	1040hrs in a rolling 12mths	Health	1040hrs in a rolling 12mths	Health	never ¹	Health	never ¹
	Vacation	1yr. cont. service	Vacation	1yr. cont. service	Vacation	1yr. cont. service	Vacation	never ¹
	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service	City Sick Pay	6mths cont. service	City Sick Pay	never ¹
	Holidays	upon appointment	Holidays	upon appointment	Holidays	depends ^{1,2}	Holidays	never ¹

¹ SEIU, Local 1021, Misc. and IFPTE, Local 21 employees are eligible if work more than 1040 hours in a rolling twelve month period. Upon working more than 1040 in a rolling twelve month period, said employees shall begin to accrue City Sick Pay, but not gain access until another six months.

² Never – employees scheduled for less than 20 hours in a pay period. Upon Appointment – employees scheduled for 20 or more hours in a pay period.

• Vacation and City Sick Pay Accruals – Vacation benefitted employees receive a retroactive allotment of vacation upon one year of service; City Sick Pay benefitted employees accrue City Sick Pay upon appointment, but do not gain access until six months of service.

Justification for Future Public Service Aide/Trainee Positions

Project Lead: Shawn Sherburne

- Public Service Aide-Trainee positions will all be Category 18 Project positions and will be evaluated using the following factors:
 - Type of training to be provided identified
 - Expected duration of employment in the training program noted
 - City permanent civil service classification(s) incumbent would be qualified (meet the minimum qualifications) to compete for upon successful completion of the training program identified
 - Target applicant population for the program and additional requirements while employed in the program (e.g., enrolled in college) identified
 - Funding source and limitations noted
- This will require a new stand-alone form that departments will complete and attach to RTF

EFFECTIVE IMMEDIATELY

Management and Reporting of TEX 1040

- Project Lead: Melanie Morales
- *900 Hour Notice Program* – All TEX 16 employee who have worked a minimum of 900 hours in a fiscal year will be automatically noticed starting in December 2014
 - 900 hr. notices are sent to employees a week after the pay period ends
 - Example: Employee who worked a minimum of 900 hours based on hours worked through PPE December 5 will receive a notice on December 15
 - All departments will be expected to separate any employee (TEX16) prior to meeting the charter limit (1040 hours)
- *Central Agency Separation Program*- All TEX 16 employees who exceed 1040 will be automatically separated from their positions
 - DHR will administer central separations starting in January 2015

Management and Reporting of TEX 1040

- Report File Name: MRGHR0222<DEPTID>
 - My reports
 - Report lists employees who worked 500+ hours within the current FY

Management and Reporting of TEX 1040

Report ID: MRGHR0222
Database : HCPRD

CITY AND COUNTY OF SAN FRANCISCO
TEX CAT 16 CHARTER FY
1040 HOURS WORKED REPORT

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Run Date: 11/05/2014
Run Time: 10:06:38

From Date: 01-JUL-2014
Thru Date: 10-OCT-2014

Department: DPH Count: 26

EMPLID	EMPL RCD	NAME	UNION	JOB CODE	SCHED	EXEMPT CAT	DEPT	TOTAL HOURS*
	0		250	2303	A	16	DPH-GH	696.00
	0		250	2303	A	16	DPH-GH	596.00
	0		250	2736	A	16	DPH-LH	592.00
	0		790	2467	A	16	DPH-GH	583.50
	0		250	2736	A	16	DPH-LH	576.00
	0		250	2736	A	16	DPH-LH	576.00
	0		250	2736	A	16	DPH-LH	576.00
	0		250	2430	A	16	DPH-GH	576.00
	0		250	2736	A	16	DPH-LH	572.00
	0		790	2467	A	16	DPH-GH	568.00
	0		250	2409	A	16	DPH-GH	560.00
	0		250	2430	A	16	DPH-GH	560.00
	0		250	2736	A	16	DPH-LH	560.00
	0		250	2430	A	16	DPH-GH	552.00
	0		790	2467	A	16	DPH-GH	549.00
	0		790	2587	A	16	DPH-PC	546.00
	0		250	2303	A	16	DPH-GH	540.00
	0		250	2303	A	16	DPH-GH	540.00
	0		250	2736	A	16	DPH-LH	535.50
	0		790	9924	A	16	DPH-GH	533.00
	0		250	2424	A	16	DPH-GH	528.00
	0		790	2587	A	16	DPH-PC	520.00
	0		790	9924	A	16	DPH-GH	510.50
	0		250	2303	A	16	DPH-GH	504.00
	0		250	2303	A	16	DPH-GH	504.00
	0		790	9924	A	16	DPH-MH	500.00

Total Count: 26

Notice: Charter 10.104(16) dictates that TEX 16 employees may not exceed the equivalent of half-time (1,040 hours) during any fiscal year. Departments should use this MRGHR0222 report to proactively manage TEX 16 employee hours and avoid Charter violations before they occur by separating or transitioning employees to a non-category 16 appointment.

Centralized terminations for unaddressed Charter violations will occur once a month. Please contact your Client Services Representative for more information on centralized terminations and transition requests.

Management and Reporting of TEX 1040

■ Schedule for Central Separations

Date of Inquiry to Identify Employees who Exceed 1040 limit	Separation Notice Date	Effective Date of Separation
Friday, January 2, 2015	Thursday, January 15, 2015	January 23, 2015 COB
Friday, February 13, 2015	Thursday, February, 19, 2015	March 6, 2015 COB
Friday, March 13, 2015	Thursday, March 26, 2015	April 3, 2015 COB
Friday, April 10, 2015	Thursday, April 23, 2015	May 1, 2015 COB
Friday, May 8, 2015	Thursday, May 21, 2015	May 29, 2015 COB
Friday, June 5, 2015	Thursday, June 18, 2015	June 26, 2015 COB

Job Experience Crediting (JEC)

Project Leads: John Kraus and Anna Biasbas

- JEC applies to SEIU classes when 15% or more of the total base hours are worked by TEX 16 employees in the 12 month period that ends 3 months prior to the anticipated job posting
- DHR will post quarterly reports on the web showing hours worked by TEX 16 employees, by classification, during a 12 month period [<http://www.sfdhr.org/index.aspx?page=601>]
- When agencies plan examination announcements, they will refer to this report to identify SEIU classes that are subject to JEC

SEIU Job Experience Crediting Reports

Classifications where TEX Cat. 16 employees worked ('WKP') 15+% of the total hours worked in a classification for the 12 months ending 3 months prior to the anticipated job posting date.

Fiscal Year	Quarter	Job Postings	Report	Pay Period Ending	
				Start	End
FY14-15	One	7/1/14 - 9/30/14	R01	6/21/2013	6/6/2014
	Two	10/1/14 - 12/31/14	R02	9/27/2013	9/12/2014
	Three	1/1/15 - 3/31/15	R03	12/20/2013	12/5/2014
	Four	4/1/15 - 6/30/15	R04	3/28/2014	3/13/2015
FY15-16	One	7/1/15 - 9/30/15	R05	6/20/2014	6/5/2015
	Two	10/1/15 - 12/31/15	R06	9/26/2014	9/11/2015
	Three	1/1/16 - 3/31/16	R07	12/19/2014	12/4/2015
	Four	4/1/16 - 6/30/16	R08	3/27/2015	3/11/2016
FY16-17	One	7/1/16 - 9/30/16	R09	6/19/2015	6/3/2016
	Two	10/1/16 - 12/31/16	R10	9/25/2015	9/9/2016
	Three	1/1/17 - 3/31/17	R11	12/18/2015	12/2/2016
	Four	4/1/17 - 6/30/17	R12	3/25/2016	3/10/2017

Reports:

- R01 – Job Posting 7/1/14 through 9/30/14
- R02 – Job Posting 10/1/14 through 12/31/14

SEIU Job Exp. Crediting Report

Hours Worked for PPE 6/21/13 - 6/06/14

Class	Title	All	Cat. 16	Percent
1474	Claims Process Clerk	1,704	#N/A	#N/A
1478	Senior Water Services Clerk	69,248	304	0.44%
1480	Principal Water Services Clerk	16,883	#N/A	#N/A
1630	Account Clerk	129,813	13,524	10.42%
1632	Senior Account Clerk	227,969	8,862	3.89%
1634	Principal Account Clerk	61,146	1,251	2.05%
1635	Health Care Billing Clerk 1	18,376	#N/A	#N/A
1636	Health Care Billing Clerk 2	84,904	983	1.16%
1637	Patient Accounts Clerk	21,025	#N/A	#N/A
1662	Patient Accounts Asst Sprv	8,630	#N/A	#N/A
1663	Patient Accounts Supervisor	8,622	#N/A	#N/A
1664	Patient Accounts Manager	3,449	#N/A	#N/A
1704	Communications Dispatcher 1	36,894	9,541	25.86%
1705	Communications Dispatcher 2	29,306	4,534	15.47%
1706	Telephone Operator	13,163	#N/A	#N/A
1708	Senior Telephone Operator	28,325	3,808	13.44%

JEC Points are Awarded:

- to acknowledge relevant and recent job-related experience
- only when candidate possesses at least 6 months (1040 hours) of relevant, satisfactory work experience in the two year period prior to the job announcement
- in Class and Position-Based Examinations

JEC Supplemental Questionnaire Points Automatically Awarded

TEX employees with 6+ months of CCSF experience **(60 Points)**

Applicants with 6+ months of similar experience with another employer
(30 Points)

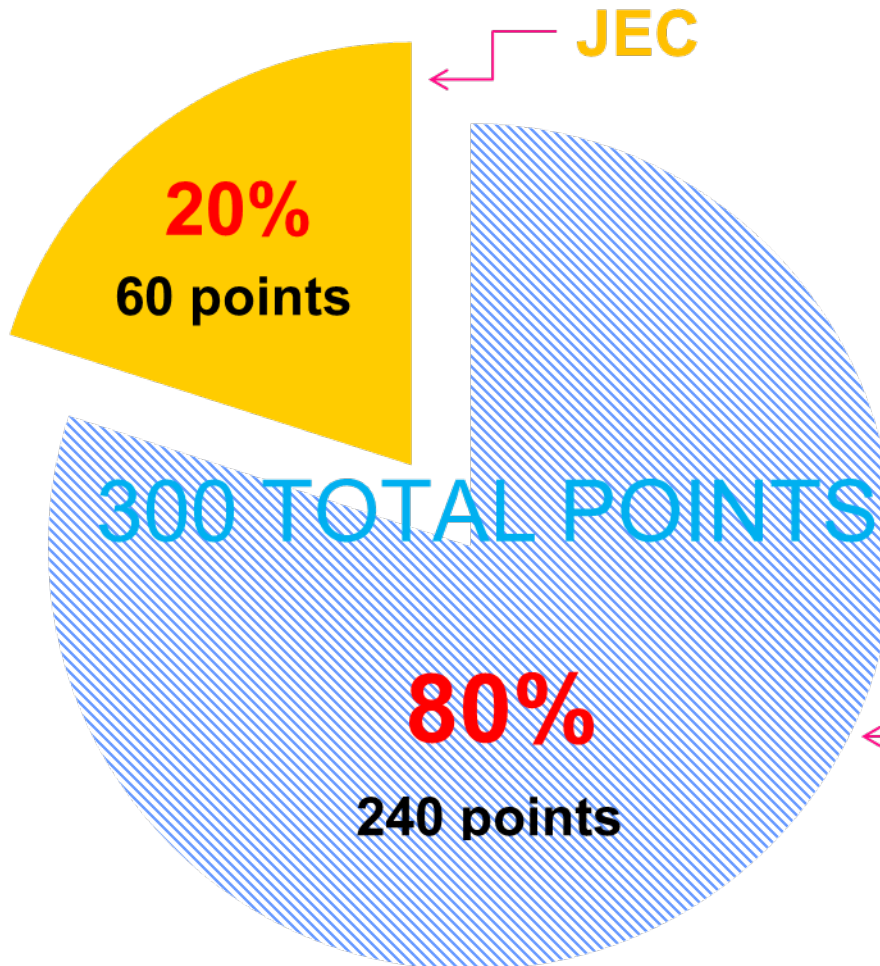
6+ months of TEX experience with the CCSF, plus additional similar
experience with another employer **(60 Points)**

< 6 months of TEX experience with the CCSF, but a combined total of 6+ of
experience with the CCSF and another employer **(30 Points)**

< 6 months of job-related experience **(0 Points)**

*Applicants provide specific date(s), employer(s), supervisor(s), contact
information, etc. for verification purposes.*

Test Weight Allocation



Highest Passing Score	1000
Lowest Passing Score	<u>700</u>
Range of Possible Points	300

**OTHER SELECTION
PROCEDURES**

Points to Consider

- JEC points awarded only when candidate passes all selection procedures

- Candidates may receive Promotive Points (in a combined entrance/promotional announcement) or JEC Points, but not both

- RAS Assistance:
 - Supplemental Questionnaire template
 - Instructions on how to process JEC points in JobAps
 - Report of TEX employees identified as JEC-qualified

(Contact Anna Biasbas, RAS Operations Manager, 415-557-4806)

HR Training Related to TEX 16

- Project Leads: Shawn Sherburne and Fred Ryan
- New On-Demand Training (located on DHR Portal)

The image shows a screenshot of a training presentation slide. On the left is a 'Table of Contents' sidebar with a list of slide titles: Welcome, Background, Charter Exemptions, Justifications, PeopleSoft, Multiple Head Count, Management, and Review. The main slide area features the title 'Category 16: Temporary & Seasonal Appointments' in a large, bold font, with the subtitle 'An Overview' below it. To the right of the text is a full-body photograph of a man in a light blue button-down shirt and brown trousers. At the bottom left of the slide is the official seal of the City and County of San Francisco, followed by the text 'City and County of San Francisco Department of Human Resources'. A video player control bar is visible at the bottom of the slide, including play, back, forward, volume, and close buttons.

Reference to DHR Memo

Memo No. 08-2014 dated November 3, 2014

<http://dhrportal.org/numbered-memos/>