Columbia City Council
Pre-Council Meeting Minutes – March 1, 2010 – 6 p.m.
Conference Rooms 1A and B – City Hall Addition
Columbia, Missouri

Council members present: Mayor Pro Tem Laura Nauser, Paul Sturtz, Jason Thornhill, Karl Skala, Jerry Wade, Barbara Hoppe

Absent: Mayor Darwin Hindman

Mayor Pro Tem Laura Nauser called the meeting to order at 6 p.m.

Council Agenda Item
Councilman Wade asked why the staff memo for B51-10, relating to new positions in the Public Works and Water and Light Departments, did not reflect input from the Water and Light Advisory Board. City Manager Bill Watkins said that the Advisory Board would consider the proposal at its March 2, 2010 meeting. B51-10 is set for first reading this evening and is important to make progress toward adequate staffing for both departments.

The City Manager said that Boards and Commissions was the planned topic for the Council's March 15, 2010 pre-Council session. March 24, 2010 is the suggested date for the Columbia Schools – Boone County Commission – Columbia City Council meeting, probably starting at 7:30 a.m. and hosted at the School District office. The dedication of the City Hall Addition and the Boards and Commissions reception is planned for 6 p.m. that evening.

Talent Strategy Committee Report
Assistant City Counselor Cavanaugh Noce reviewed the committee's charge, its process and its recommendations for improving the City's ability to train and prepare both new employees and those who are ready to accept higher levels of responsibility. The City Manager appointed the employee committee to help retain knowledge expected to be lost as older employees retire. As part of a continuing workforce development plan, the committee recommends several actions:
1. Name a facilitator, reporting directly to the City Manager, to create a pilot program with one or two City departments;
2. Identify internal and external sources for training;
3. Provide general training for employees who are not supervisors or managers; and
4. Create a mentoring program.

Next steps could include proposing funds for the facilitator position in the FY 2011 budget and preparing a proposal for the remainder of FY 2010 to use current resources to start these activities. Council could move to do so during the Council Comments part of its meeting agenda.
(Supporting documents: Workforce Development Plan; Visualizing Retirement Trends by Department)

Audit Committee Report
Audit Committee Chair Ed Scavone reviewed the City's FY 2008 – 2009 Comprehensive Annual Financial Report in advance of his presentation during the Council's regular meeting. As a result of taking new bids on the three year auditing contract, the City saved money, got a high-quality product and enjoyed improved communication with McGladrey and Pullen LLP, the new

firm. Finance Department Director Lori Fleming directed Council members to the report's overview, noting that there were no findings that had not already been discussed. Revenues will have to be restated for a ten-year period because of an accounting change required by GASB (Governmental Accounting Standards Board) that affects the year in which some revenues are recognized. That affects both ending and beginning balances.
(Supporting document: Comprehensive Annual Financial Report
http://www.gocolumbiamo.com/Finance/Services/Financial_Reports/FY2009_CAFR/documents/ 1-2009-intro.pdf)

Public Transportation Commission Appointments
City Clerk Sheela Amin discussed the Council's need to re-visit the matrix used to make these commission appointments. Two of the six candidates have enough votes to be appointed, but the remaining candidates must be re-evaluated.

The meeting adjourned at approximately 6:45 p.m.

Minutes prepared by Toni Messina, Director, Public Communications

Visualizing Retirement Trends
in the City of Columbia
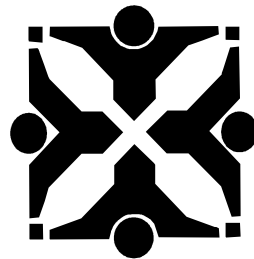
Based on retirement eligibility data from
Human Resources, as of September 1, 2009

Notes

- Organizational charts have been updated to reflect the reallocations made in the Fiscal Year 2010 budget

- Some positions in departmental organizational charts are funded, partially or fully, through another department, CIP fund, grant, etc. They are included to show the organizational impact of their retirement on the department

- As noted on the appropriate slides, there is a different retirement eligibility schedule for uniformed police and fire personnel

Key
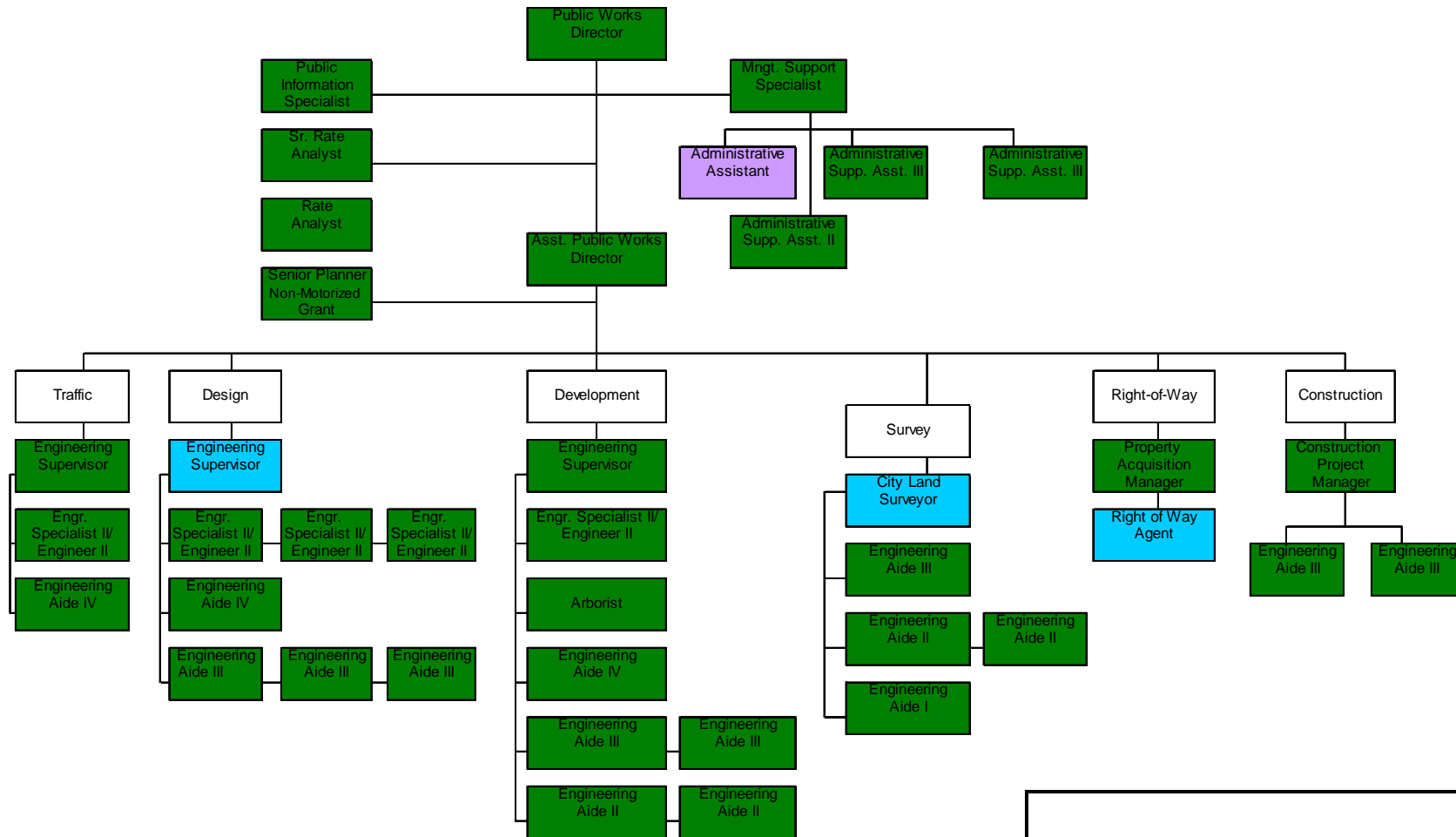
Green = Not Eligible for Retirement

Blue = Eligible within 5 Years

Purple = Eligible within 1 Year

Yellow = Could Retire Now

* White boxes are division titles, such as Accounting under Finance

Administration & Engineering (Public Works)

Public Works Director

- Public Information Specialist
- Sr. Rate Analyst
- Rate Analyst
- Senior Planner Non-Motorized Grant
- Asst. Public Works Director

Mngt. Support Specialist

- Administrative Assistant
- Administrative Supp. Asst. III
- Administrative Supp. Asst. III
- Administrative Supp. Asst. II

Traffic
- Engineering Supervisor
- Engr. Specialist II/ Engineer II
- Engineering Aide IV

Design
- Engineering Supervisor
- Engr. Specialist II/ Engineer II
- Engr. Specialist II/ Engineer II
- Engr. Specialist II/ Engineer II
- Engineering Aide IV
- Engineering Aide III
- Engineering Aide III
- Engineering Aide III

Development
- Engineering Supervisor
- Engr. Specialist II/ Engineer II
- Arborist
- Engineering Aide IV
- Engineering Aide III
- Engineering Aide III
- Engineering Aide II
- Engineering Aide II

Survey
- City Land Surveyor
- Engineering Aide III
- Engineering Aide II
- Engineering Aide II
- Engineering Aide I

Right-of-Way
- Property Acquisition Manager
- Right of Way Agent

Construction
- Construction Project Manager
- Engineering Aide III
- Engineering Aide III

Green = Not Eligible for Retirement

Blue = Eligible within 5 Years

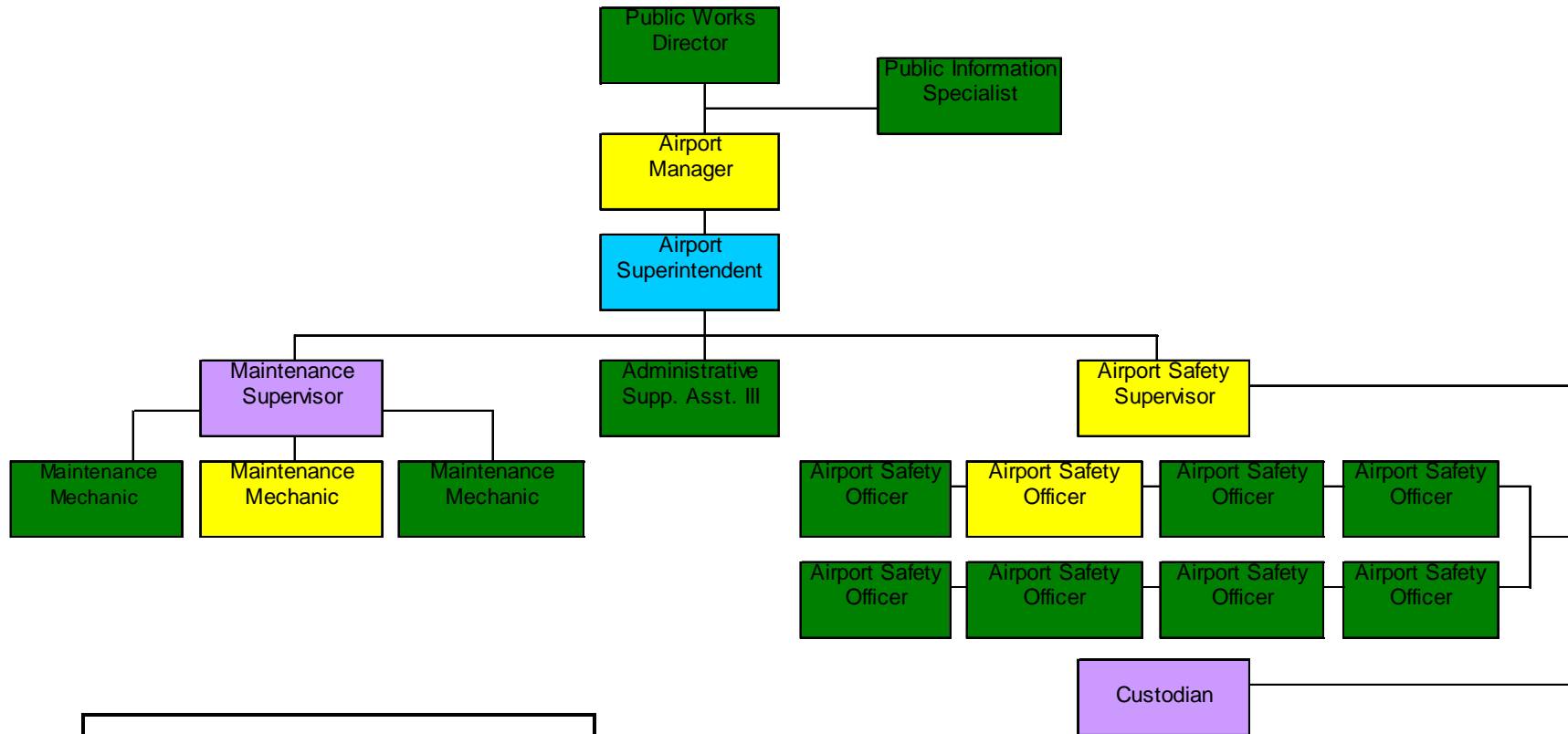**Purple** = Eligible within 1 Year
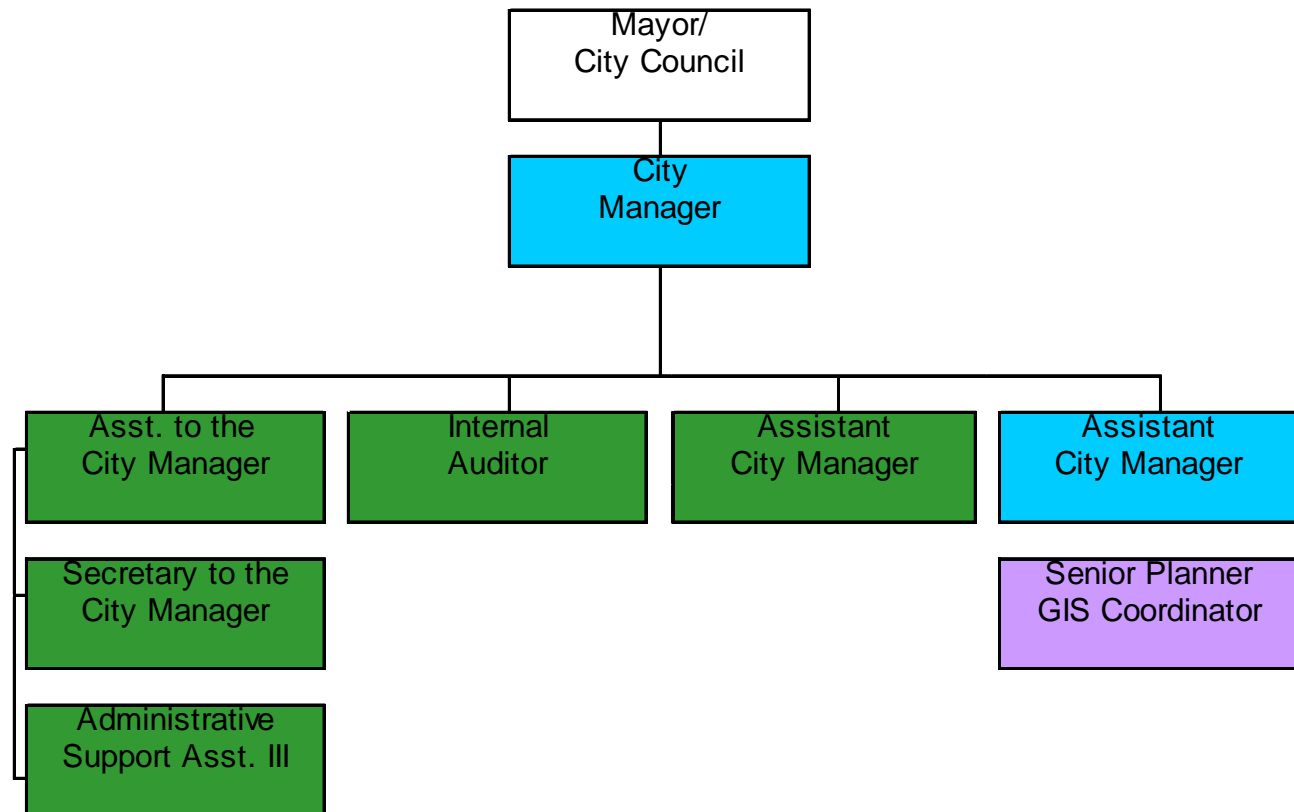
Yellow = Could Retire Now

Airport (Public Works)

Public Works Director

Public Information Specialist

Airport Manager

Airport Superintendent

Maintenance Supervisor

Administrative Supp. Asst. III

Airport Safety Supervisor

Maintenance Mechanic

Maintenance Mechanic

Maintenance Mechanic

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Airport Safety Officer

Custodian

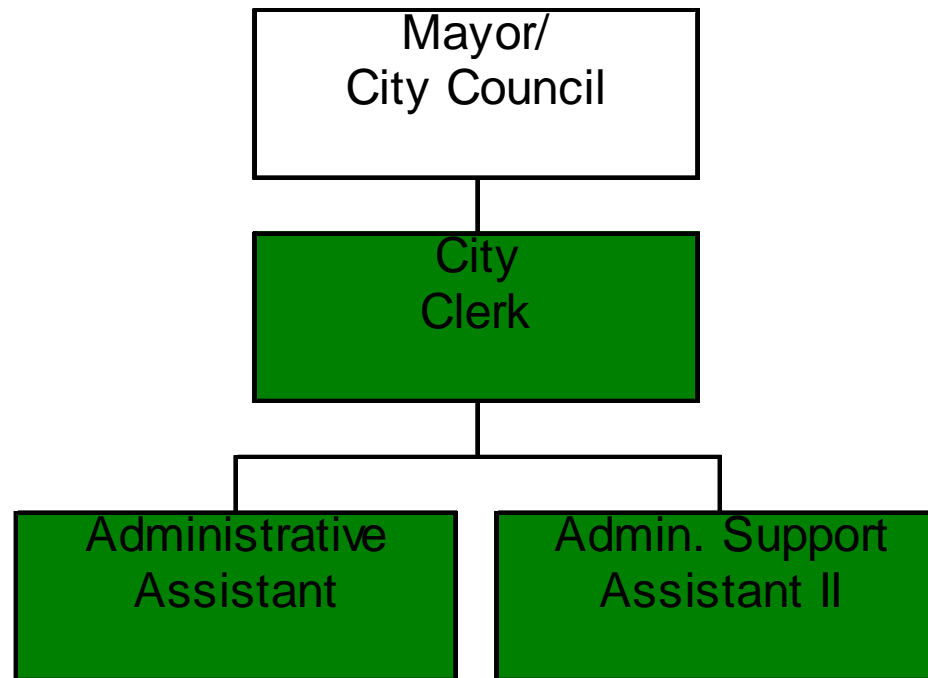**Green** = Not Eligible for Retirement

Blue = Eligible within 5 Years

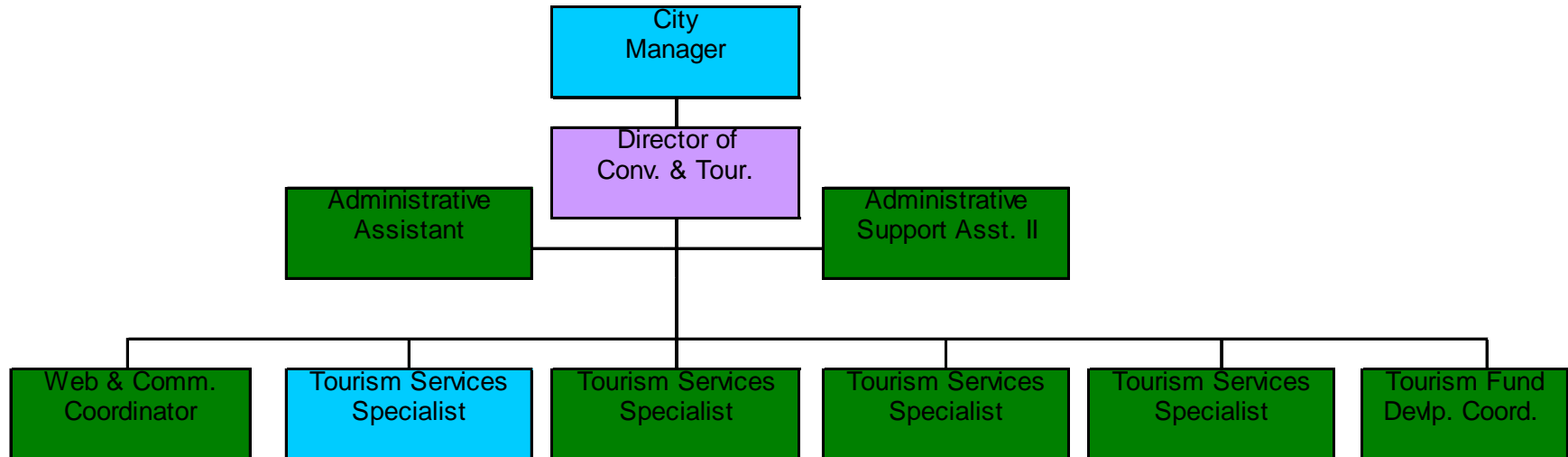**Purple** = Eligible within 1 Year

Yellow = Could Retire Now

City Manager's Office

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                    ┌──────────────┐
                    │   Mayor/     │
                    │ City Council │
                    └──────┬───────┘
                           │
                    ┌──────┴───────┐
                    │    City      │
                    │   Manager    │
                    └──────┬───────┘
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Asst. to the City Manager	Internal Auditor	Assistant City Manager	Assistant City Manager

Secretary to the City Manager			Senior Planner GIS Coordinator

Administrative Support Asst. III

Clerk

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            ┌─────────────────┐
            │     Mayor/      │
            │  City Council   │
            └────────┬────────┘
                     │
            ┌────────┴────────┐
            │      City       │
            │      Clerk      │
            └────────┬────────┘
          ┌──────────┴──────────┐
┌─────────┴────────┐  ┌─────────┴────────┐
│  Administrative  │  │  Admin. Support  │
│    Assistant     │  │   Assistant II   │
└──────────────────┘  └──────────────────┘
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Convention & Visitor's Bureau

City
Manager

Director of
Conv. & Tour.

Administrative
Assistant

Administrative
Support Asst. II

Web & Comm.
Coordinator

Tourism Services
Specialist

Tourism Services
Specialist

Tourism Services
Specialist

Tourism Services
Specialist

Tourism Fund
Devlp. Coord.
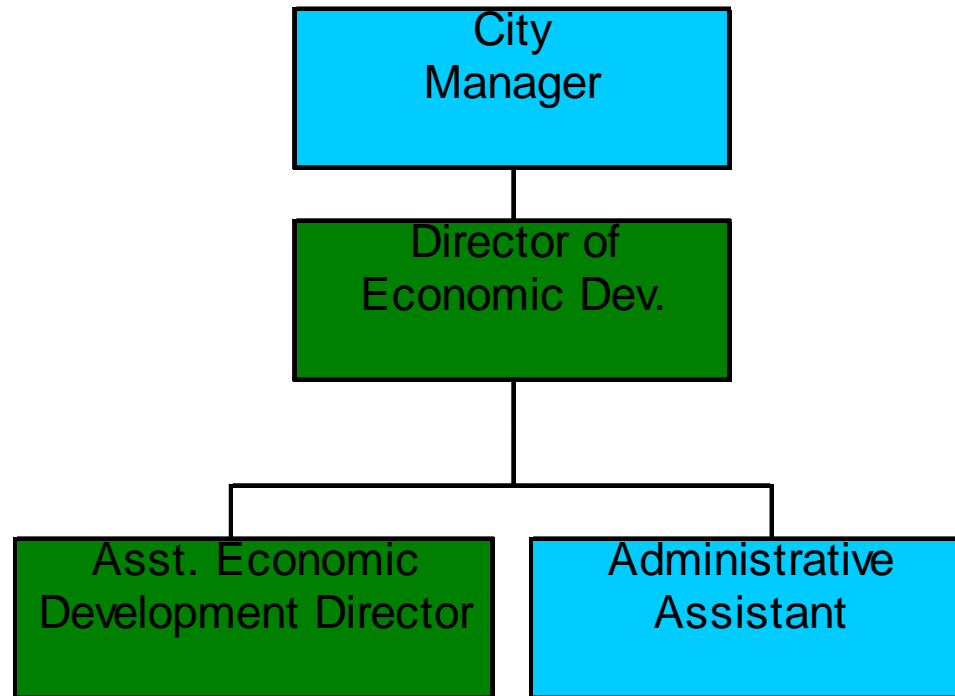
Cultural Affairs

Custodial & Building Maintenance (Public Works)

Economic Development

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                    ┌──────────────┐
                    │     City     │
                    │   Manager    │
                    └──────┬───────┘
                    ┌──────┴───────┐
                    │  Director of │
                    │ Economic Dev.│
                    └──────┬───────┘
              ┌────────────┴────────────┐
   ┌──────────┴──────────┐   ┌──────────┴──────────┐
   │   Asst. Economic    │   │   Administrative    │
   │ Development Director │   │     Assistant       │
   └─────────────────────┘   └─────────────────────┘
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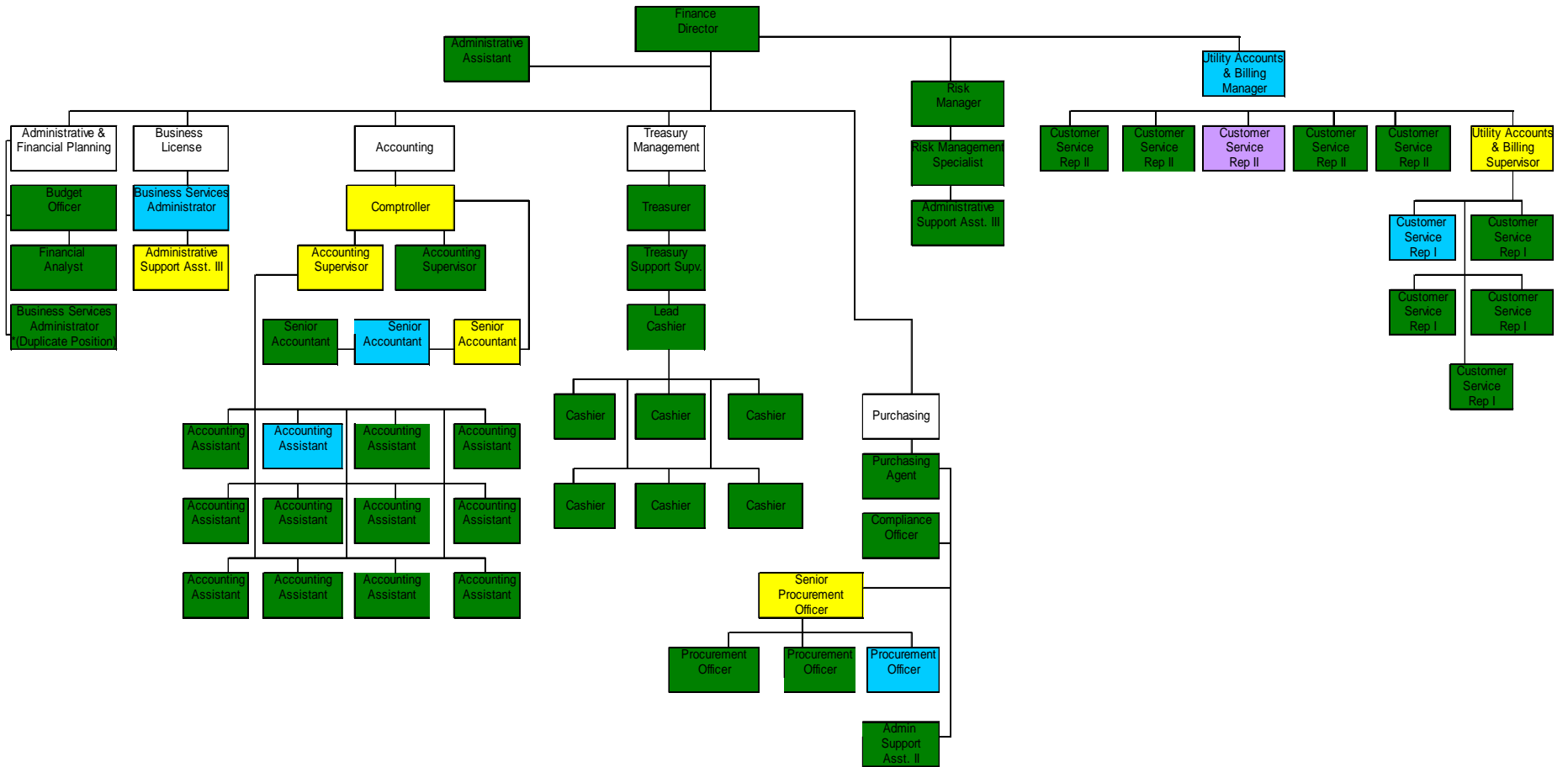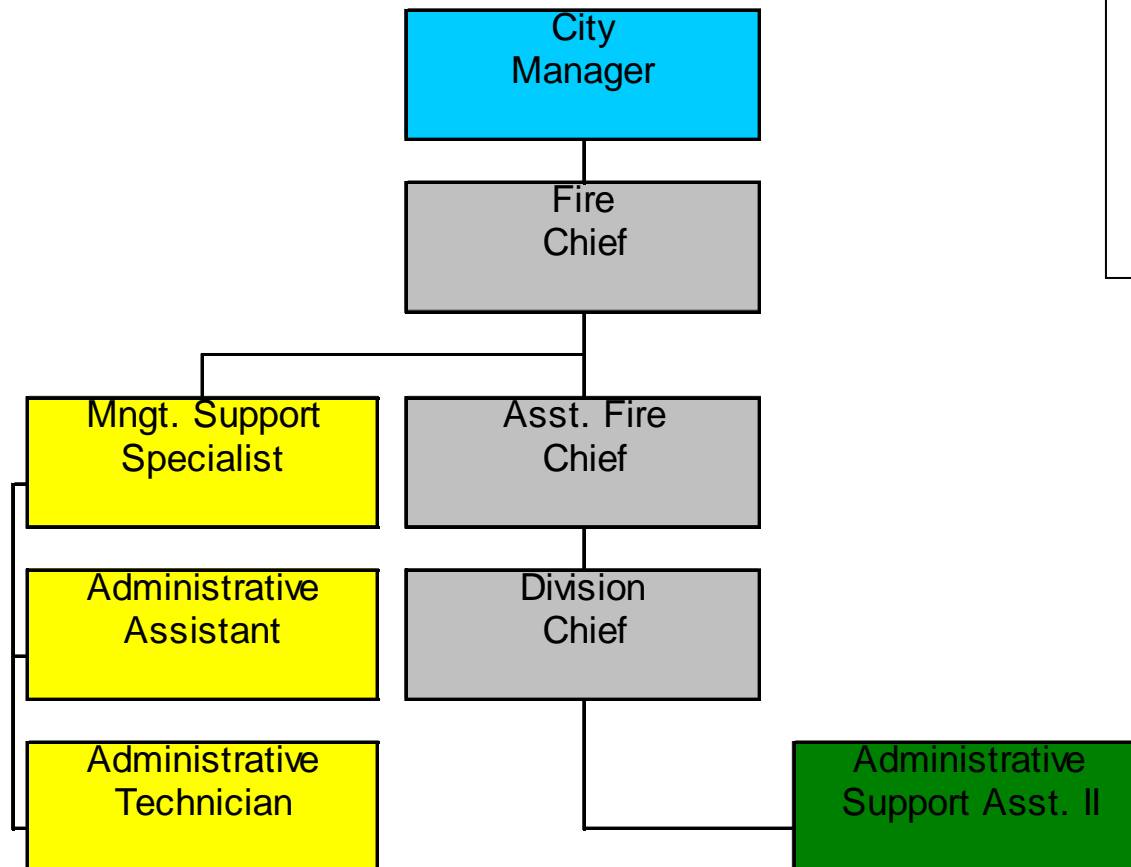
Employee Benefit Fund

Finance

Fire – Administration

Gray indicates Uniformed Fire personnel. They are on a different retirement schedule than civilian personnel. For these positions, see next slide with unique key.

City Manager

Fire Chief

Mngt. Support Specialist

Asst. Fire Chief

Administrative Assistant

Division Chief

Administrative Technician

Administrative Support Asst. II

Fire – Marshal and Training

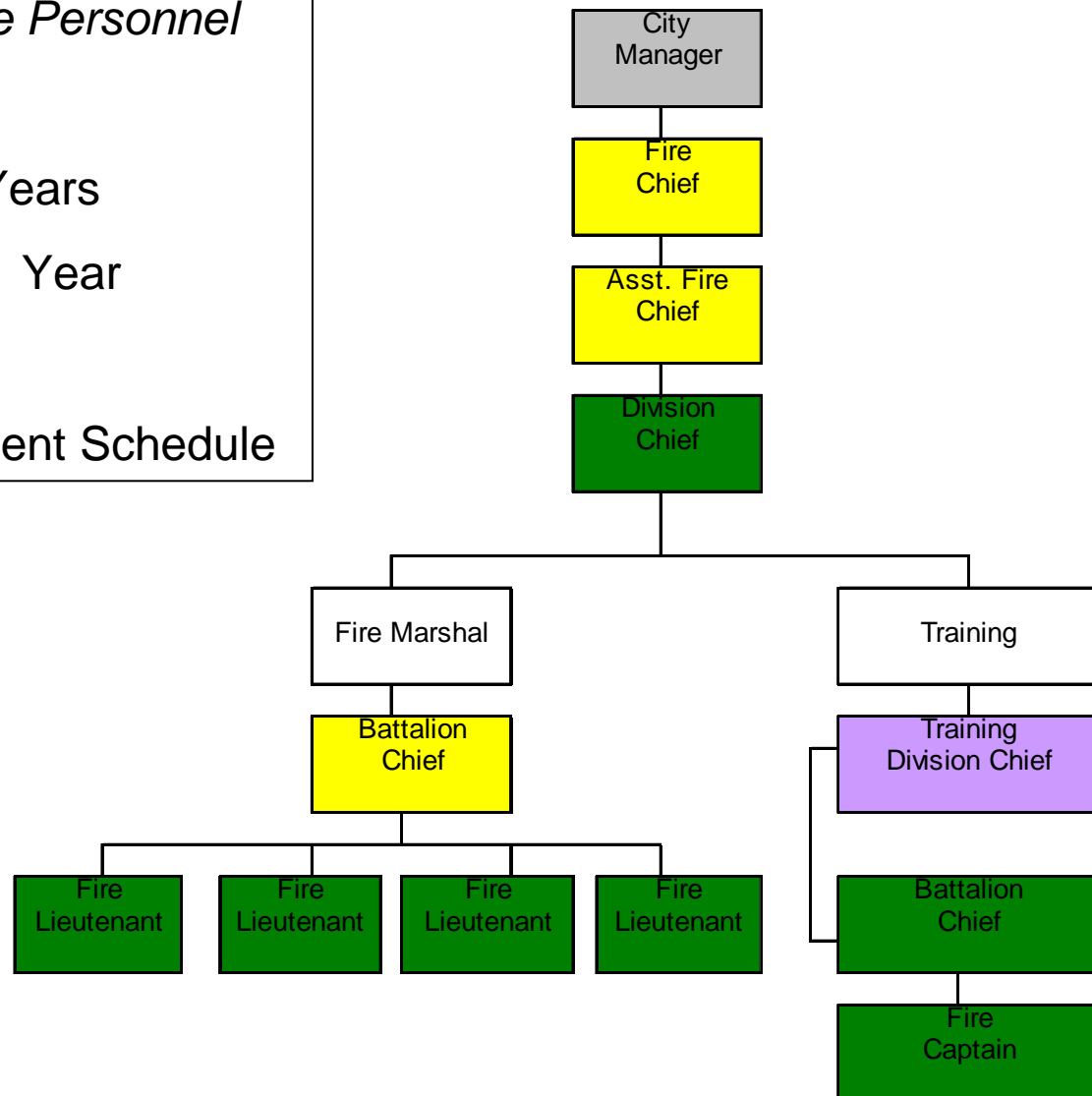**Key for Uniformed Fire Personnel**
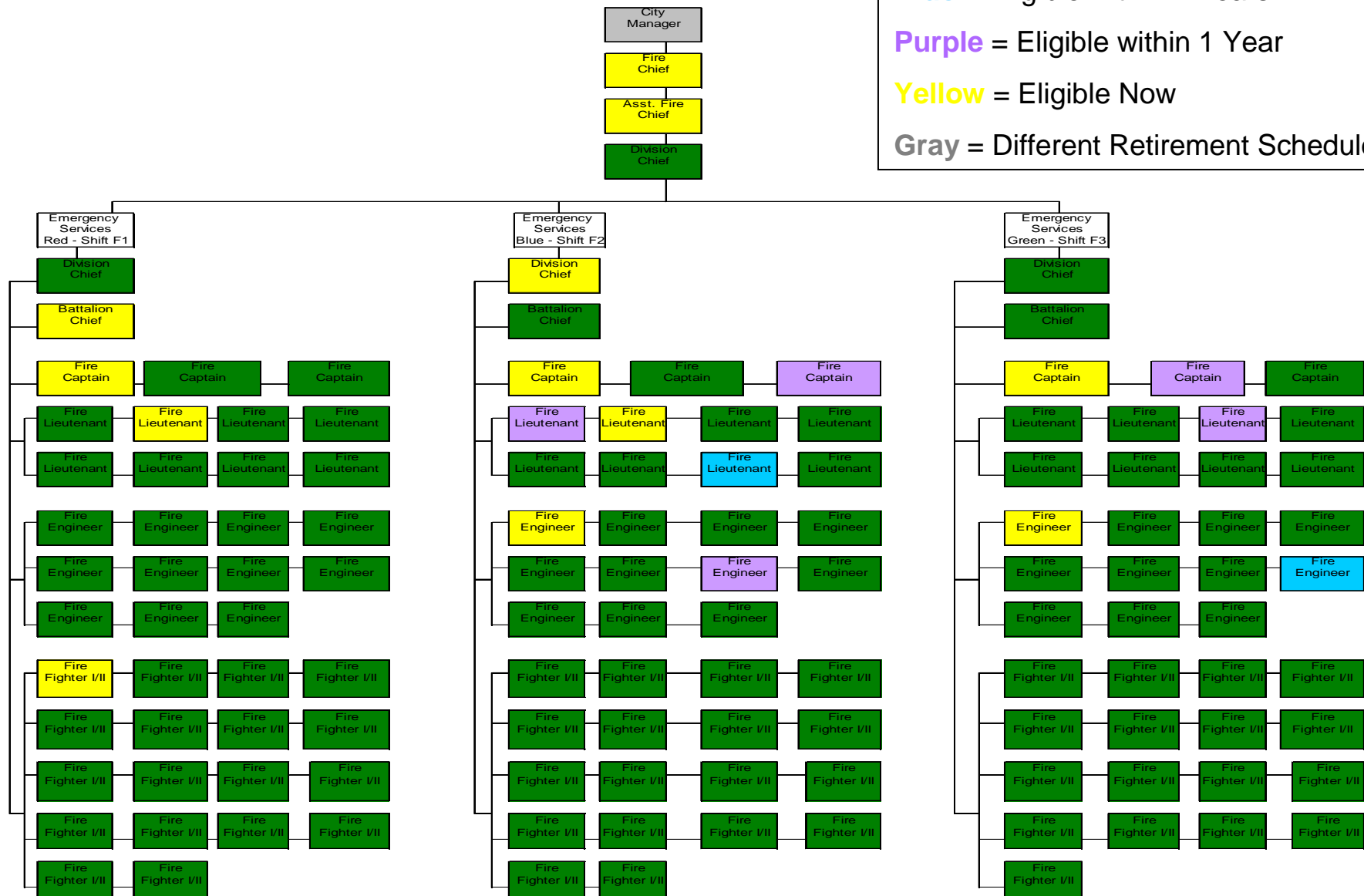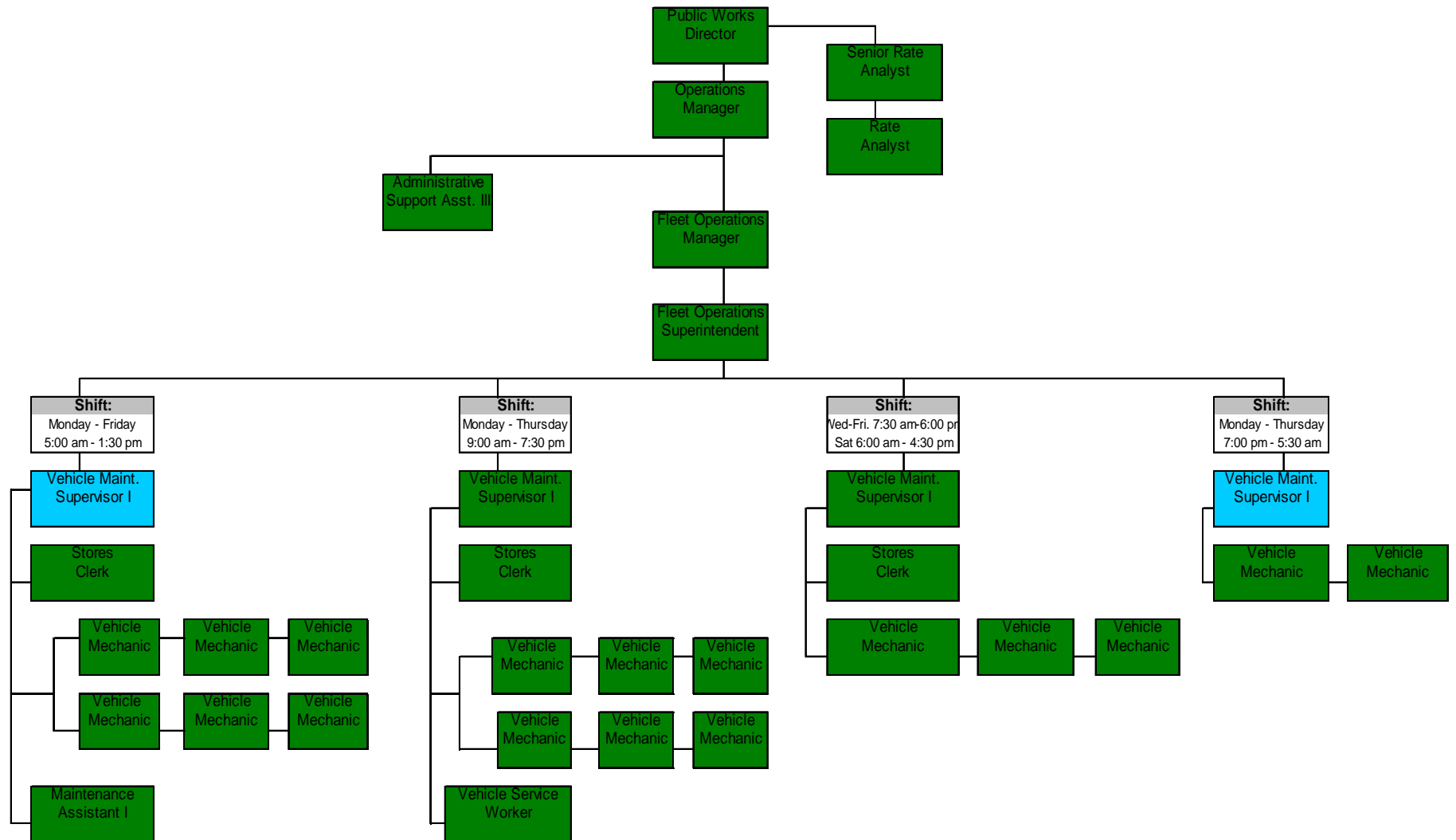
Green = Not Eligible

Blue = Eligible within 2 Years

Purple = Eligible within 1 Year

Yellow = Eligible Now

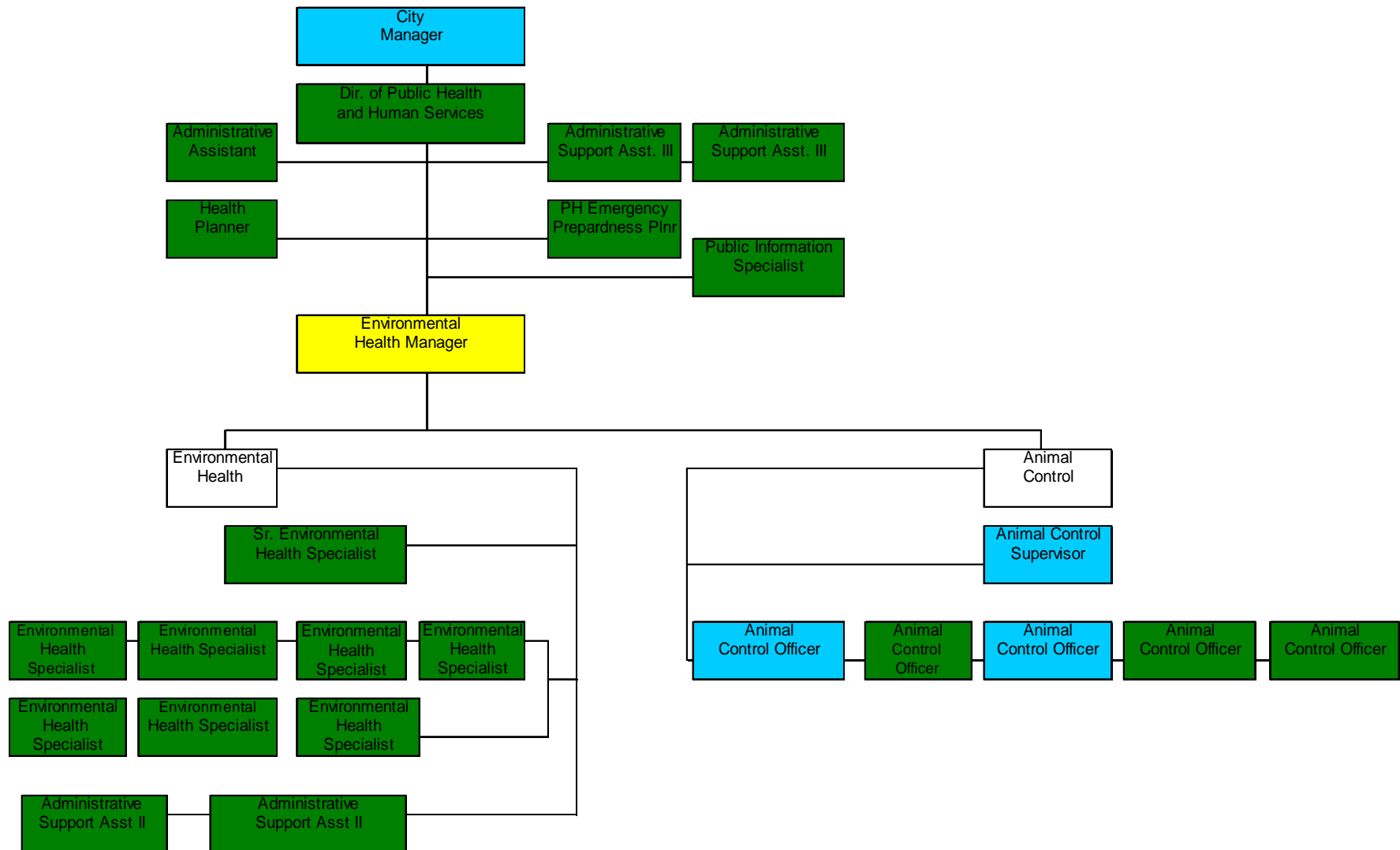**Gray** = Different Retirement Schedule

City Manager

Fire Chief

Asst. Fire Chief

Division Chief

Fire Marshal

Training

Battalion Chief

Training Division Chief

Fire Lieutenant

Fire Lieutenant

Fire Lieutenant

Fire Lieutenant

Battalion Chief

Fire Captain

Fire – Emergency Services

City Manager

Fire Chief

Asst. Fire Chief

Division Chief

Emergency Services Red - Shift F1

- Division Chief
- Battalion Chief
- Fire Captain | Fire Captain | Fire Captain
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II

Emergency Services Blue - Shift F2

- Division Chief
- Battalion Chief
- Fire Captain | Fire Captain | Fire Captain
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II

Emergency Services Green - Shift F3

- Division Chief
- Battalion Chief
- Fire Captain | Fire Captain | Fire Captain
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Lieutenant | Fire Lieutenant | Fire Lieutenant | Fire Lieutenant
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer | Fire Engineer
- Fire Engineer | Fire Engineer | Fire Engineer
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II | Fire Fighter I/II
- Fire Fighter I/II

Fleet (Public Works)

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                          ┌──────────────────┐
                          │  Public Works    │────────┐
                          │   Director        │        │
                          └──────────────────┘  ┌──────────────┐
                                   │            │ Senior Rate   │
                          ┌──────────────────┐  │  Analyst      │
                          │  Operations      │  └──────────────┘
                          │   Manager        │        │
                          └──────────────────┘  ┌──────────────┐
                          │        │            │   Rate        │
              ┌────────────┘       │            │  Analyst      │
   ┌──────────────────┐            │            └──────────────┘
   │  Administrative  │   ┌──────────────────┐
   │  Support Asst. III│  │ Fleet Operations │
   └──────────────────┘   │   Manager        │
                          └──────────────────┘
                                   │
                          ┌──────────────────┐
                          │ Fleet Operations │
                          │  Superintendent  │
                          └──────────────────┘
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Shift:	Shift:	Shift:	Shift:
Monday - Friday 5:00 am - 1:30 pm	Monday - Thursday 9:00 am - 7:30 pm	Wed-Fri. 7:30 am-6:00 pm Sat 6:00 am - 4:30 pm	Monday - Thursday 7:00 pm - 5:30 am
Vehicle Maint. Supervisor I	Vehicle Maint. Supervisor I	Vehicle Maint. Supervisor I	Vehicle Maint. Supervisor I
Stores Clerk	Stores Clerk	Stores Clerk	Vehicle Mechanic, Vehicle Mechanic
Vehicle Mechanic (×6)	Vehicle Mechanic (×6)	Vehicle Mechanic (×3)	
Maintenance Assistant I	Vehicle Service Worker		

Health – Community and Social Services

City
Manager

Dir. of Public Health
and Human Services

Administrative
Assistant

Administrative
Support Asst. III

Administrative
Support Asst. III

Health
Planner

PH Emergency
Prepardness Plnr

Public Information
Specialist

Community & Social
Services Manager

Human
Services

Social Services
Supervisor

Social Services
Specialist

Social Services
Specialist

Social Services
Specialist

Family Support
Worker

Human Rights
Specialist

Administrative
Support Asst. III

Health – Environmental

Health – Public Health

City Manager

Dir. of Public Health and Human Services

Administrative Assistant

Administrative Support Asst. III

Administrative Support Asst. III

Health Planner

PH Emergency Prepardness Plnr

Public Information Specialist

Public Health Manager

Nurse Practictioner

Nurse Practictioner

Nurse Practictioner

Nursing

Nursing Coordinator

Public Health Nurse

Public Health Nurse

Public Health Nurse

Public Health Nurse

Public Health Nurse

Licensed Practical Nurse

Support Staff

Administrative Support Supv.

Administrative Support Asst. III

Administrative Support Asst. II

Administrative Support Asst. II

Administrative Support Asst. II

(WIC) Women Infant and Children

Nutrition Coordinator

Health Professional Asst

Health Professional Asst

Health Professional Asst

Health Professional Asst

Nutritionist

Nutritionist

Administrative Support Asst I

Health Promotion

Health Promotion Coordinator

Health Educator

Health Educator

Health Educator

Communicable Disease

Comm. Disease Epidemiology Coord

Public Health Nurse

Public Health Nurse

Senior Lab Analyst

Human Resources

Information Technologies

Law

Light Administration (Water & Light)

Director of Water & Electric

Administrative Support Supv
- Administrative Technician
- Administrative Support Asst. III
- Administrative Support Asst. III
- Administrative Support Asst. II

Engineering Manager

Engineering Supervisor
- Plan Reviewer
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Aide III
- Engineering Aide II

Engineering Supervisor
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Specialist II/ Engineer II
- Engineering Aide IV
- Engineering Aide III
- Engineering Aide III
- Engineering Aide II

Utility Services Mngr
- Utility Services Specialist
- Graphic Artist

Energy Services Superintendent
- Energy Services Supervisor
  - Energy Mngt Specialist II
- Energy Mngt Specialist II
- Energy Mngt Specialist I
- Energy Technician

Energy Services Supervisor
- Energy Mngt Specialist II
- Energy Mngt Specialist II

Mngr, Rates & Fiscal Planning
- Senior Rates Analyst
- Rates Analyst
- Rates Analyst
- DMA Rate Analyst

Light Production (Water & Light)

Light Transmission & Distribution (Water & Light)

Municipal Court

Neighborhood Services

City Manager

Neighborhood Srvcs Coordinating Board

Mngr of Neighborhood Services

Admin. Support Asst. III

Asst. City Counselor III

Sr. Environmental Health Specialist

Volunteer Prog. Asst.

Neighborhood Coordinator

Police Officer

Senior Building Inspector

Building Inspector

Building Inspector

Office of Sustainability

Parking Facilities (Public Works)

Parking Enforcement (Public Works)

Parks & Recreation General Fund

Director of Parks & Recreation

Manager of Recreation Services

CARE Program Youth Employment Training

Social Services Supervisor

Public Info. Specialist

Parks Services Manager

Administrative Support Supvsr

Administrative Support Asst III

Administrative Support Asst II

Administrative Support Asst I

Park Ranger

Park Develpmt Superintendent

Management Supp Specialist

Administrative Support Asst. III

Parks Supervisor

Maintenance Specialist

Maintenance Asst. II

Vehicle Maint. Supervisor

Vehicle Mechanic

Vehicle Mechanic

Parks Supervisor

Horticulturist

Groundskeeper II

Forester

Groundskeeper II

Groundskeeper I

Equipment Operator II

Park Construction Sup

Construction Specialist

Equiptment Operator II

Equipment Operator II

Maintenance Mechanic

Equipment Operator II

Senior Parks Planner

Senior Parks Planner

Engineering Aide IV

Equipment Operator II

Maintenance Mechanic

Maintenance Mechanic

Maintenance Specialist

Maintenance Mechanic

Maintenance Mechanic

Maintenance Mechanic

Maintenance Mechanic

Maintenance Mechanic

Maintenance Asst. II

Parks & Recreation Recreation Services Fund
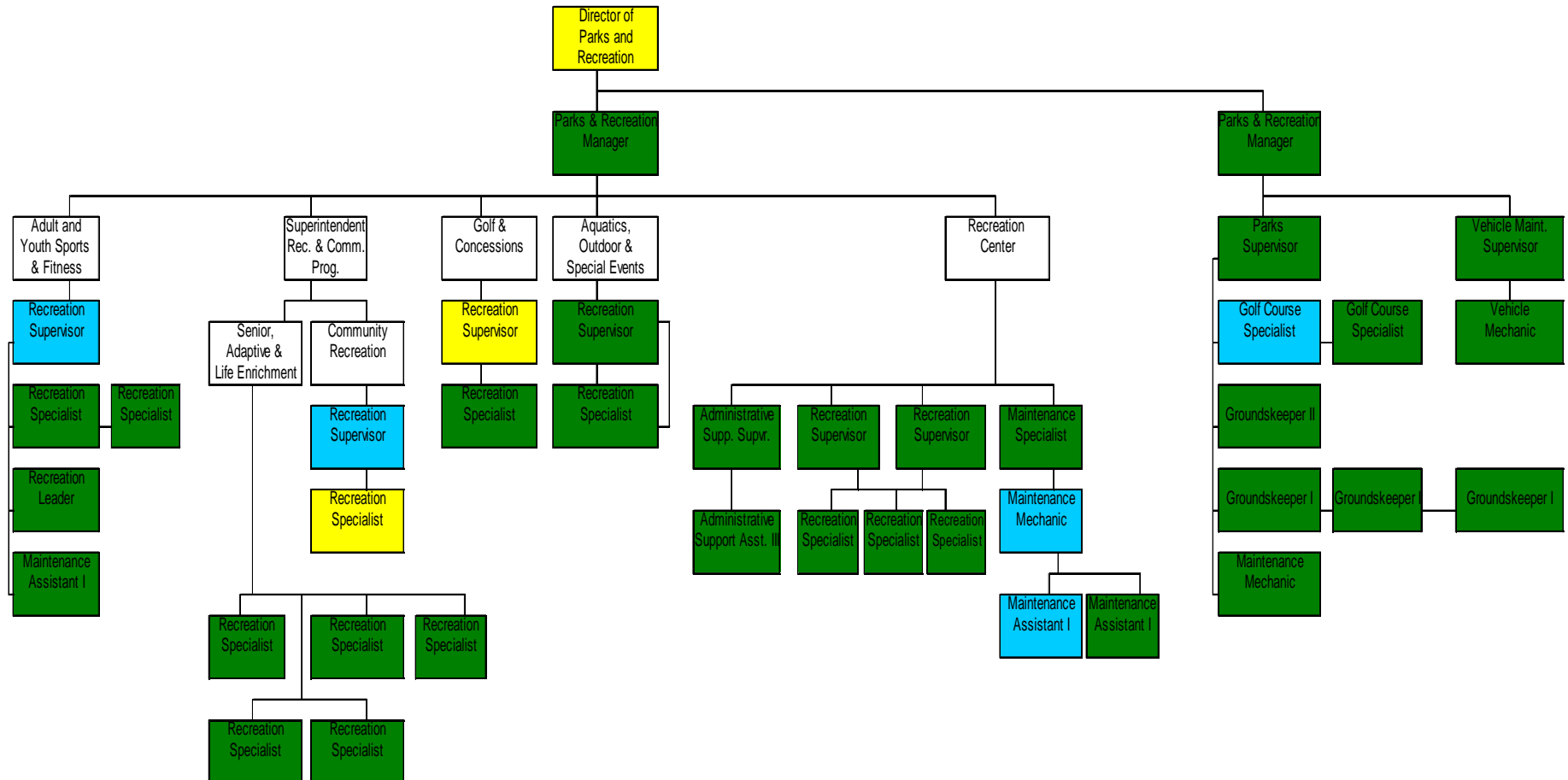
Planning
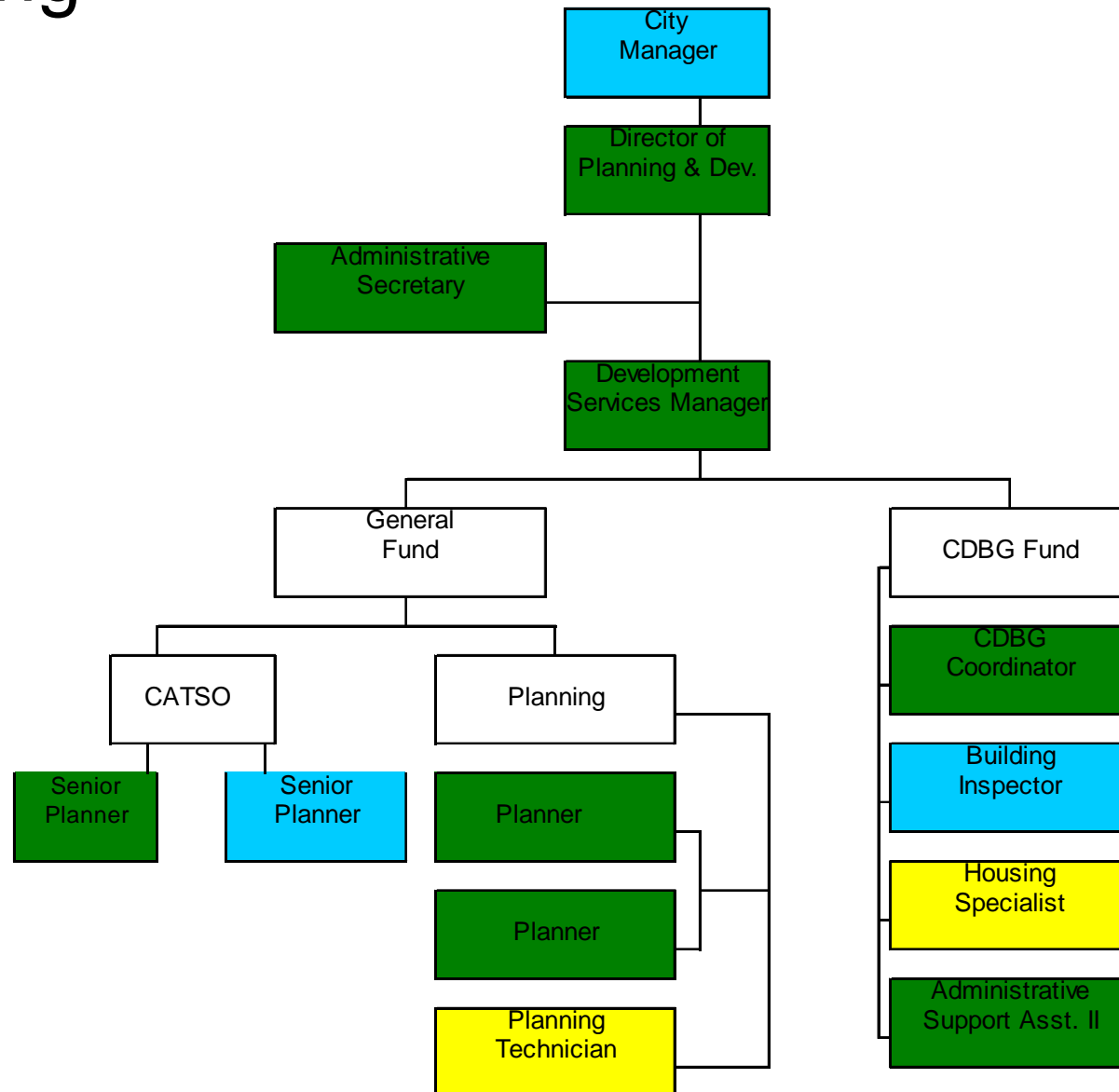
City
Manager

Director of
Planning & Dev.

Administrative
Secretary

Development
Services Manager

General
Fund

CDBG Fund

CATSO

Planning

Senior
Planner

Senior
Planner

Planner

Planner

Planning
Technician

CDBG
Coordinator

Building
Inspector

Housing
Specialist

Administrative
Support Asst. II

Police

Police is currently in the process of
assigning Officers and Sergeants to a
newly created organizational structure

Protective Inspection (Public Works)
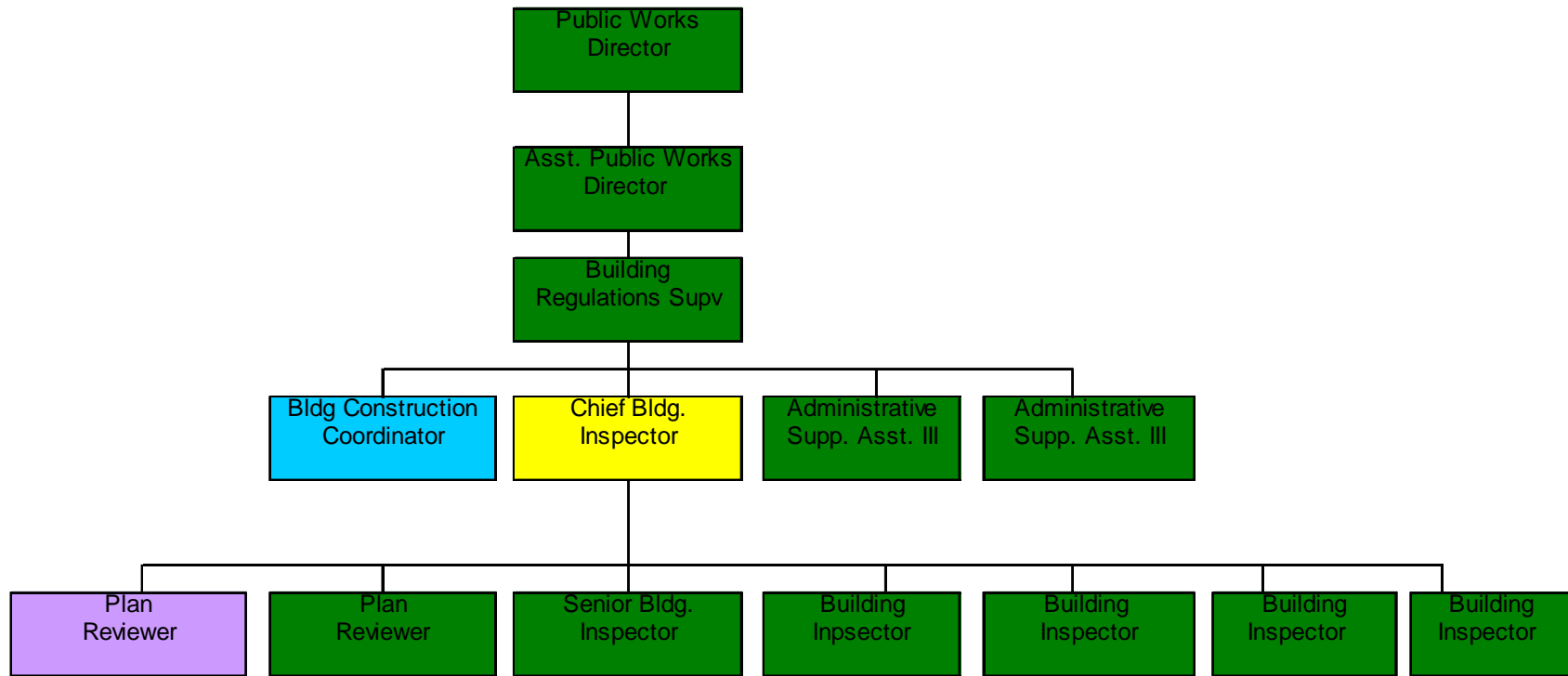
PSJC & Emergency Management

Public Communications

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                          ┌──────────────┐
                          │    City      │
                          │   Manager    │
                          └──────┬───────┘
                          ┌──────┴───────┐
                          │ Director of  │
                          │Communications│
                          └──────┬───────┘
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Publications Specialist	E-Government Coordinator	Public Comm. Officer	City Channel Coordinator

Print Services	Mail Services

Graphic Artist

Printer II

Video Engineering Specialist

Printer I

Videographer

Administrative Support Asst. I	Administrative Support Asst. I

Railroad (Public Works)

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                    ┌──────────────┐
                    │    City      │
                    │   Manager    │
                    └──────┬───────┘
                           │
                    ┌──────┴───────┐
                    │  Director of │
                    │Water & Electric│
                    └──────┬───────┘
                           │
                    ┌──────┴───────┐        ┌──────────────┐
                    │Power Production│ - - - │  Engineer II │
                    │ Superintendent │       └──────────────┘
                    └──────┬───────┘
                           │
                    ┌──────┴───────┐
                    │Railroad Operations│
                    │  Supervisor  │
                    └──────┬───────┘
          ┌────────────────┼────────────────┐
   ┌──────┴───────┐ ┌──────┴───────┐ ┌──────┴───────┐
   │  Maintenance │ │   Railroad   │ │   Railroad   │
   │  Specialist  │ │   Operator   │ │   Operator   │
   └──────────────┘ └──────────────┘ └──────────────┘
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Sewer Utility (Public Works)
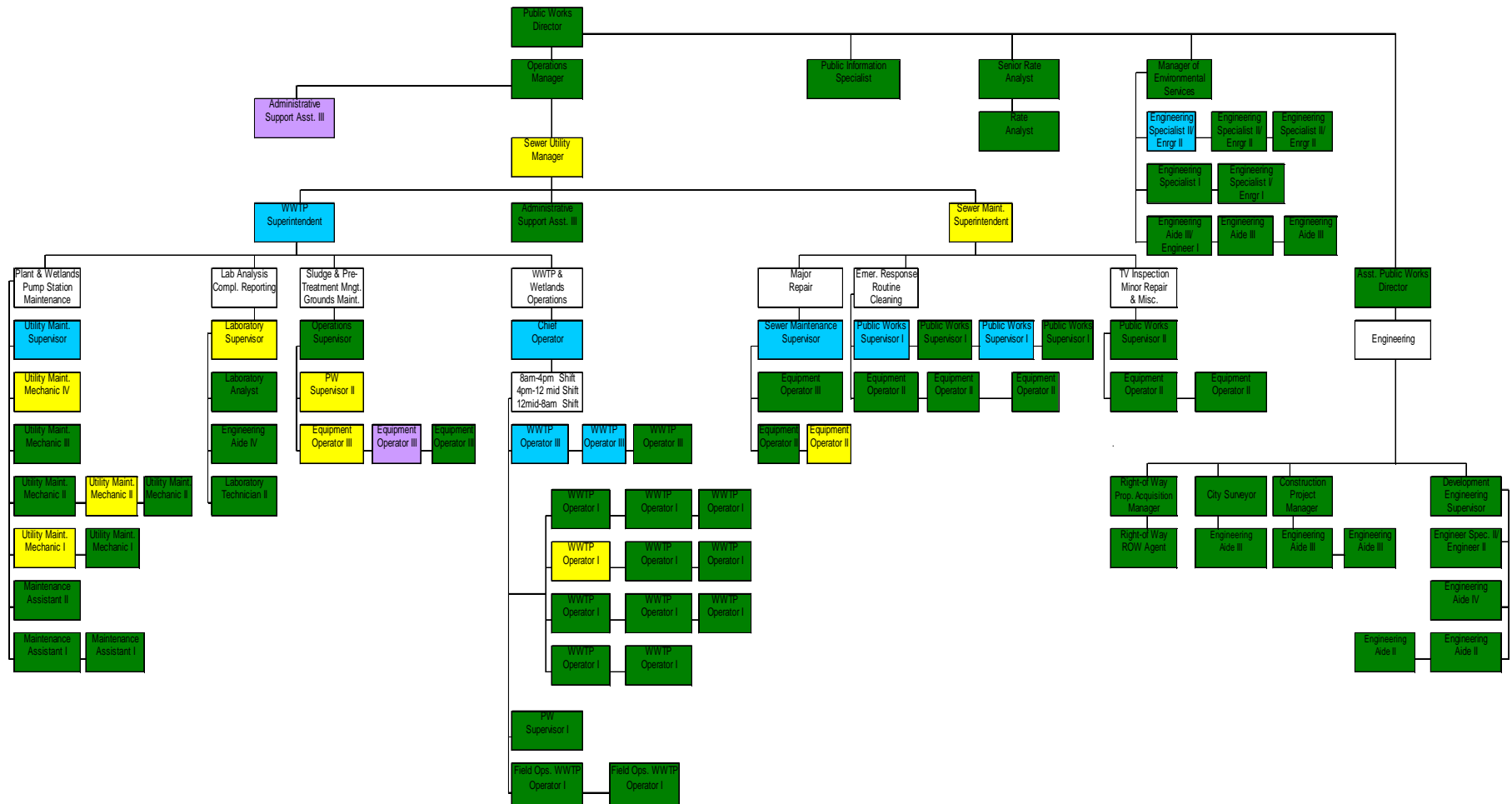
Solid Waste (Public Works)
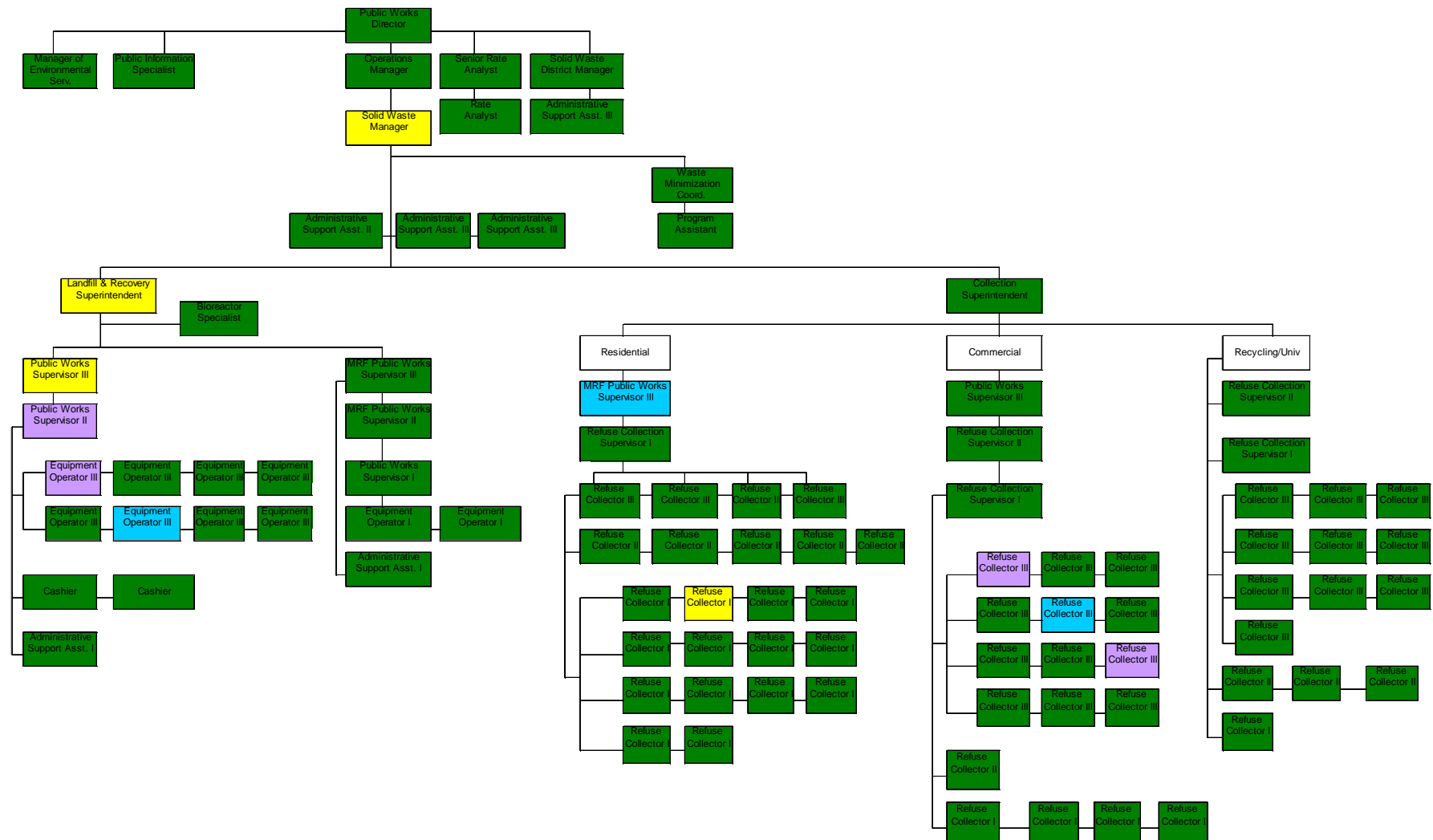
Storm Water (Public Works)

Street Division (Public Works)

Transit (Public Works)

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                          ┌──────────────────┐
                          │  Public Works    │
                          │    Director       │
                          └──────────────────┘
        ┌──────────────────────┼──────────────────────┐
┌────────────────┐   ┌──────────────────┐   ┌────────────────┐
│ Public Information │  │ Transportation  │   │ Senior Rate   │
│    Specialist    │   │    Manager      │   │   Analyst     │
└────────────────┘   └──────────────────┘   └────────────────┘
                            │                        │
                     ┌──────────────┐         ┌────────────┐
                     │Transportation│         │   Rate     │
                     │  Supervisor  │         │  Analyst   │
                     └──────────────┘         └────────────┘
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| Bus Dispatcher | Bus Dispatcher | Bus Dispatcher | Bus Dispatcher | Administrative Supp. Asst. II | Administrative Supp. Asst. II | Administrative Supp. Asst. III |

Bus Driver	Bus Driver	Bus Driver	Bus Driver	Bus Driver
Bus Driver	Bus Driver	Bus Driver	Bus Driver	Bus Driver
Bus Driver	Bus Driver	Bus Driver	Bus Driver	Bus Driver
Bus Driver	Bus Driver	Bus Driver	Bus Driver	Bus Driver
Bus Driver	Bus Driver	Bus Driver	Bus Driver	Bus Driver
Bus Driver	Bus Driver			

| Vehicle Service Worker | Vehicle Service Worker |

Water Administration (Water & Light)

Water Production & Distribution (Water & Light)

Director of Water and Electric

Administrative Support Asst. III

Manager Water Operations

Water Distribution Superintendent
- Chief Operator Wtr. Distrib. Supv III
- Chief Operator Wtr. Distrib. Supv III
- Water Dist. Supv. I
- Water Dist. Supv. II
- Water Dist. Supv.II
- Water Dist. Supv.II
- Const. & Maint. Water Dist. Supv. I
- Const. & Maint. Water Dist. Supv.I
- Equiptment Operator III
- Equipment Operator III
- Equipment Operator III
- Water Distribution Technician
- Valve Loc. & Maint. Equip. Operator II
- Valve Loc. & Maint. Equip.Operator II
- Contract Coord. Equip.Operator II
- Service Installation Equip. Operator II
- Service Installation Equip. Operator II
- Service Installation Equip.Operator II
- Service Installation Equip.Operator II
- Equipment Operator II
- Engineering Aide IV

Water Distribution Services Supt.
- Chief Operator Wtr. Distrib. Supervisor III
- Services Crew Water Dist. Supv. i
- Services Crew Water Dist. Supv. I
- Services Crew Water Dist. Supervisor I
- Services Crew Equip. Operator II
- Services Crew Equip. Operator II
- Services Crew Equip. Operator II
- Services Crew Equip. Operator II
- Services Crew Equip.Operator II
- Cross Connection Control Tech.
- Meter Testing Technician
- Disinfection & Sampling Tech.
- Utility Service Worker II
- Utility Service Worker II

Water Treatment Plant Supt.
- Chief Operator Water Trtmnt Plant
- Water Quality Specialist
- Water Treatment Plant Oper. III
- Water Treatment Plant Oper. III
- Water Treatment Plant Oper. III
- Water Treatment Plant Oper. III
- Water Treatment Plant Oper. III
- Lab Technician II
- Water Treatment Plant Oper. I
- Water Treatment Plant Oper. I
- Water Treatment Plant Oper. I
- Water Treatment Plant Oper. I
- Water Treatment Plant Oper. I

Water Utility Maint. Supervisor
- WTP Utility Maint. Mechanic III
- WTP Utility Maint. Mechanic III
- Instrument Technician
- Instrument Technician

Water Production & Distribution, cont. (Water & Light)

Retirement Eligibility, Department-wide

Department	Total Dept Employees	Eligible in 5 Years or Less	% Dept Eligible in 5 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
City Manager's Office	8	3	38%	1	13%	0	0%
Clerk's Office	3	0	0%	0	0%	0	0%
Convention & Visitors Bureau	9	2	22%	1	11%	0	0%
Cultural Affairs	3	0	0%	0	0%	0	0%
Economic Development	3	1	33%	0	0%	0	0%
Employee Benefit Fund	4	0	0%	0	0%	0	0%
Finance	54	14	26%	8	15%	7	13%
Fire, Non-uniformed	4	3	75%	3	75%	3	75%
Health	63	13	21%	2	3%	2	3%
Human Resources	9	3	33%	1	11%	1	11%
Information Technologies	26	5	19%	1	4%	0	0%
Law	10	2	20%	2	20%	2	20%
Municipal Court	9	3	33%	1	11%	1	11%
Neighborhood Services	9	4	44%	2	22%	2	22%
Office of Sustainability	2	0	0%	0	0%	0	0%
Parks & Recreation	78	14	18%	6	8%	6	8%
Planning	12	4	33%	2	17%	2	17%
Police, Non-uniformed	33	5	15%	3	9%	3	9%
PSJC	33	2	6%	2	6%	2	6%
Public Communications	11	1	9%	0	0%	0	0%
Public Works	358	64	18%	38	11%	27	8%
Water & Light (incl. Railroad)	251	64	25%	40	16%	32	13%

Department	Total Dept Employees	Eligible in 2 Years or Less	% Dept Eligible in 2 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
Fire, Uniformed	136	21	15%	19	14%	13	10%
Police Uniformed	158	20	13%	17	11%	11	7%

Problem Areas: Department-wide

- Departments that anticipate over ¼ retirement turnover in the *next 5 years*:
  - Manager's Office, Economic Development, Finance, Civilian Fire, HR, Municipal Court, Neighborhood Services, Planning, Water & Light

- Departments in which over 15% is eligible *within 1 year*:
  - Finance, Civilian Fire, Law, Neighborhood Services, Planning, Water & Light

- Departments in which over 15% is *eligible now*:
  - Civilian Fire, Law, Neighborhood Services, Planning

Problem Areas: Department-wide

- The departments in which a significant % is eligible now or in 1 year are small;
  - 2 to 3 eligible employees in these departments strongly influence the retirement percentage
  - However, these may be critical positions – retirement eligible individual may be the keeper of knowledge
  - Water & Light is the exception (larger department with 16% eligible in 1 year)
  - Civilian fire administration is especially high at 75% eligible now

Other Findings

- In most departments, retirements logically cluster at the upper management level
- Some departments were more at the lower levels:
  - Animal Control and Nursing in Public Health
  - HR, which has fairly flat structure
- In some departments, retirement eligible scattered in upper management and lower levels
  - Neighborhood Services, Planning, Airport and Storm Water within Public Works

Retirement Eligibility, Managers and Supervisors Only

Department	Managers or Supervisors	Eligible in 5 Years or Less	% of Managers/Supervisors Eligible in 5 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
City Manager's Office	4	2	50%	0	0%	0	0%
Clerk's Office	1	0	0%	0	0%	0	0%
Convention & Visitor's Bureau	1	1	100%	1	100%	0	0%
Cultural Affairs	2	0	0%	0	0%	0	0%
Economic Development	1	0	0%	0	0%	0	0%
Employee Benefit Fund	1	0	0%	0	0%	0	0%
Finance	14	6	43%	4	29%	4	29%
Fire, Non-uniformed	0	0	0%	0	0%	0	0%
Health	14	4	29%	1	7%	1	7%
Human Resources	1	0	0%	0	0%	0	0%
Information Technologies	22	2	9%	1	5%	0	0%
Law	5	2	40%	2	40%	2	40%
Municipal Court	2	1	50%	0	0%	0	0%
Neighborhood Services	1	0	0%	0	0%	0	0%
Office of Sustainability	1	0	0%	0	0%	0	0%
Parks & Recreation	44	9	20%	5	11%	5	11%
Planning	4	1	25%	0	0%	0	0%
Police, Non-uniformed	3	0	0%	0	0%	0	0%
PSJC	8	2	25%	2	25%	2	25%
Public Communications	4	0	0%	0	0%	0	0%
Public Works	101	31	31%	17	17%	15	15%
Water & Light	97	43	44%	27	28%	19	20%

Department	Managers or Supervisors	Eligible in 2 Years or Less	% of Managers/Supervisors Eligible in 2 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
Fire, Uniformed	52	16	31%	15	29%	10	19%
Police Uniformed	29	6	21%	5	17%	3	10%

Problem Areas: Managers & Supervisors

- Departments that anticipate over ¼ retirement turnover of managers and supervisors in the *next 5 years*:
  - Manager's Office, Convention & Visitor's Bureau, Finance, Health, Law Municipal Court, Planning, PSJC, Public Works, Water & Light

- Departments in which over 15% of managers and supervisors are eligible *within 1 year*:
  - Convention & Visitor's Bureau, Finance, Municipal Court, PSJC, Public Works, Water & Light

- Departments in which over 15% of managers and supervisors are *eligible now*:
  - Finance, Municipal Court, PSJC, Public Works, Water & Light

Departments not as Affected by Retirements

- Clerk
- Cultural Affairs
- PSJC
- Street, Custodial & Building Maintenance, Fleet, and Transit in Public Works
- Health (except for Animal Control division)

Connection to Workforce Development Model

Phase IV
Evaluate and Revise
Assess what is and is not working. Make adjustments if needed. Address new issues that arise.

Phase I
Set Strategic Direction
Determine future workforce requirements based on projected goals and requirements.

Phase III
Implement Workforce Plan
Communicate plan and allocate resources for strategies. Establish timeline and performance measures.

Phase II
Workforce Analysis
Identify discrepancies between supply and demand. Develop strategy to reduce shortages or surpluses.

Workforce Analysis: Cannot predict non-retirement turnover, but this information goes a long way toward showing where city will experience gaps

Connection to Workforce Development Model

Implementation:

- ## $50,000 allocated for Workforce Talent Strategy in FY2010
  - Estimated Supervisor/Manager training costs $50,800
  - This would train 2 cycles of 50 people per cycle (or 100 supervisors/managers in FY2010)
    - Succession (Leadership) training was estimated at $7,000

- ## Need to decide how to allocate for training among departments
  - Should more be given to departments with high %'s eligible within 1 year or currently eligible?
  - Or, equal amounts, since high %'s partly a factor of small departments (only need 2-3 replacements)

Information Still Needed in Workforce Analysis

- ## If possible surpluses exist
  - Requires information about duties and workload
- ## Who within the lower ranks (not eligible for retirement) is a potential manager or supervisor

Other Implications

- May want to implement policy that every person eligible to retire within 1 year or 6 months documents knowledge base:
  - Required whether employee plans to take retirement upon eligibility or not
  - Includes anecdotal evidence, anomalies, how they see position changing in the future, etc.
  - More information than captured during exit interview

CITY OF COLUMBIA, MISSOURI

WORKFORCE DEVELOPMENT PLAN

Submitted by the
Workforce Talent Strategy Committee
January 15, 2010

CITY OF COLUMBIA
WORKFORCE TALENT STRATEGY COMMITTEE

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BACKGROUND

Since 2006, research has been conducted on the changing workforce for the City of Columbia. Increasing numbers of City workers are eligible to retire over the next five years, resulting in a great loss of institutional knowledge. "Workforce Planning Guide"[1] and "Visualizing Retirement Trends"[2] documents give detailed information on the impact that potential retirements will have on departments and divisions.

In order to address these issues, a Talent Strategy Committee was created. The Committee consists of 17 members, representing a range of professions and lengths of service with the City. At the first meeting of the Committee in early October 2009, the City Manager presented the Committee with a charge that states, in part:

> Committee Charge
> Help insure the City of Columbia's workforce, both now and in the future, is trained and capable to effectively provide the products and services directed by the Columbia City Council. Instill a culture of a "hire to departure" learning environment within City government.
>
> Initial Tasks – Prepare a written plan that –
>
> 1. Identifies skills necessary, now and immediate future.
>
>   1A. Identifies "knowledge gaps" both for new employees and new promotions.
>
>   1B. Identifies likely short-term talent gaps.
>
>   1C. Develop a list of current training/educational practices and opportunities.
>
>   1D. Compliments and coordinates with, but does not duplicate City safety programs.
>
>   1E. Prioritizes needs.
>
> 2. Improves internal management and leadership skills for frontline, intermediate and senior managers, both current and future.
>
> 3. Provides training in an efficient, effective manner using local and internal resources wherever financially feasible.
>
> Training is not just classroom, and includes OTJ, mentoring, true hands-on.

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[1] Prepared in 2008 by interns Tanya Horvath and Eoghan (Owen) Miller
[2] Prepared in 2009 by intern Jolyn Sattizahn and presented in part to the Committee on October 6, 2009

PROCEDURE

The committee initially met on October 6, 2009. In order to meet the January 15, 2010 deadline for a written plan, the committee began meeting weekly as necessary. On November 4 four subcommittees were created:

Current Training to determine the training that departments are providing to their employees. This will include job-specific and general departmental or management training.

Management Training to research training topics for supervisors. A Request for Proposals will be sent out by Purchasing outlining the topics to be covered. Bidders will provide information on their training methods, and may be interviewed to determine the final selection of a provider.

Survey to create a survey to distribute to employees eligible to retire in one year or less.

Resources, Development and Retention to determine the best way to utilize the information gathered from the other subcommittees.

These subcommittees worked independently outside of the scheduled meetings, and submitted reports on their findings. The complete reports are attached as Appendices A – D. A summary of these reports follows.

EXECUTIVE SUMMARY

An informal study of the currently provided or available training within the City was conducted. Workers in ten departments and the City at large were asked to share training programs or classes which currently exist, whether those training programs could be utilized interdepartmentally, and what training is desired. The departments identified by the subcommittee were generally either larger in nature, or known by the subcommittee or Human Resources to have potential training opportunities. At-large City programs were also researched. For this exercise, the subcommittee sought out department employees they knew to be knowledgeable about internal opportunities, and also asked contacts to identify individuals with knowledge of training and opportunities. In general, the subcommittee's intention in this exercise was to collect a broad stroke of information across departments rather than a detailed inventory of each department's programs. In addition, Section 19 of the City code was reviewed.

As a result of this informal study, it was determined that current training primarily addresses specific on-the-job requirements and as such, limits itself to departmental use. Training for advancement and management / supervisory / leadership skills are lacking and could be the area in which a City-wide training effort could have the greatest impact.

It is recommended that management training be divided into two categories. These two categories would include a training program for "New Supervisors" and "New Managers". Training for employees in both of these categories would consist of multi-level courses, giving priority to departments having an immediate need based on expected retirements within the next five years. Training would be conducted internally on City policies and procedures, with training on other topics being provided by external vendors after the required bid process. Additionally, the development of mentoring and job shadowing programs are recommended. This would stimulate a team approach to City business and develop lines of communication that may not exist now. It would also allow for the exchange of ideas on topics most affecting these employees.

Surveys[3] were distributed to 190 employees who are eligible to retire in the next year. The recipients were asked to list the top five skills that are critical to do their job. The results indicated that 49% of the skills that will be lost to retirement are specific to the City of Columbia operations and would not be something that a new employee would have at hire. Of the eligible retirees surveyed, 104 were managers. These recipients were asked what management skills are crucial to their job. The results indicated that 91% of the management skills necessary were not job specific, and were skills needed by managers in all departments.

Current goal implementation is driven by the expandable framework.[4] The framework provides structure for organizational planning and goal setting as well as detailed practical application. This framework would serve: as the reference source for training information and seminar opportunities; institutional knowledge would be acquired from retiring personnel; and existing training systems would be examined to aid in creating City-wide training opportunities.

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[3] See Appendix C.
[4] See Appendix D.

RECOMMENDATIONS

Based on the above, the Talent Strategy Committee recommends the following actions:

1. A facilitator, reporting directly to City Administration, to create a pilot program with one or two City departments. This program would include creating a database of information gathered from retiring personnel.

2. Identify sources for training, both internal for policies and procedures, and external for general supervisor topics. City employees who have the specialized skills and/or knowledge should be encouraged to assist in or conduct training. These internal trainers would need to be allowed time away from their normal duties to develop and conduct the training. Train-the-Trainer programs should be utilized to provide more trainers and be more cost-efficient for ongoing training.

3. Provide general training for employees who are not supervisors or managers. Purchasing Procedures, Customer Service and Report Writing are a few examples.

4. Create a Mentoring Program

There are two options to implement the above priorities. One is to choose a department for a pilot program. The other option is to ask for a department to volunteer to participate in the program. This would hopefully promote cooperation and the flow of ideas and feedback during the program.

In analyzing possible retirements, the Water & Light and Finance departments have the potential to lose 25% and 26%, respectively, of employees in five years or less.[5]

Water & Light employees cover a broad range of occupations, including office staff in Administration, Equipment Operators and Operations Manager in Water Distribution, and Utility Service Workers in Electric Distribution. This department would provide opportunities to test different types of training and institutional knowledge retention.

The Finance Department stands to lose employees in Business License, Accounting, Utility Accounts Billing and Purchasing. Although these employees do not represent the broad range that Water & Light provides, there will be a great loss of City-specific technical knowledge.

Respectfully submitted,

The Workforce Talent Strategy Committee

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[5] See Retirement Eligibility spreadsheets, Appendix E

Appendix A: <u>Findings of Current Training Subcommittee</u>

Workforce Talent Strategy Committee
Study of Current Training Programs and Opportunities

An informal study of the currently provided or available training within the City was conducted by a subcommittee of the Talent Strategy Committee. Workers in ten departments and the City at large were asked to share training programs or classes which currently exist, whether those training programs could be utilized interdepartmentally, and what training is desired. The departments identified by the subcommittee were generally either larger in nature, or known by the subcommittee or HR to have potential training opportunities. The ten departments reviewed were: Employee Health, Finance, Fire, IS, Neighborhood Services, Parks and Recreation, Police, PSJC, Public Communication and Public Works. At large City programs were also researched. For this exercise, the subcommittee sought out department employees they knew to be knowledgeable about internal opportunities, and also asked contacts to identify individuals with knowledge of training and opportunities. As department heads were to be surveyed individually at a later date, they were not asked about current training and opportunities so as to avoid over-surveying. In general, the subcommittee's intention in this exercise was to collect a broad stroke of information across departments rather than a detailed inventory of each department's programs. In addition, Section 19 of the City code was reviewed.

The results were compiled, and can be generalized as follows:

1) Departments where employees must conform to a professional or legal standard conduct the most training. Columbia Police, Columbia Fire, Airport Safety, and Public Safety/Joint Communications all have required and structured training programs in order to stay compliant to their respective occupational standards. Other departments or divisions, such as Sanitary Sewer, Transit, and Solid Waste, supply specialized training pertinent to their operations. While very structured and consistent, this type of training is occupation/job specific and does not lend itself to interdepartmental use by the City as a whole.

2) Most departments conduct on-the-job training as a substantial portion of their training program. Many employees are hired with a particular job skill set/education, and then are expected to perform the duties required of their position. It is generally up to the employee to ask for help. This continues past initial employment and generally holds true as a person advances.

3) Initial entry level and required training appear the strongest. The majority of all structured training occurs on initial hire. However, even in departments where training programs are robust, training for advancement within the department or City is lacking. This is particularly the case in management, communications, and leadership/supervisory training. Most departments surveyed indicated that training to move into management/supervisory positions was not available within the department or City-wide.

4) Some departments offer training that can be beneficial to employees in other departments. Finance offers training on HTE, purchasing procedures and personnel procedures such as payroll. The Neighborhood Services Department offers classes such as Treekeepers and volunteer training that employees have participated in. Additionally, IT provides periodic training on new software, software upgrades and Geographic Information Systems (GIS). At present time, these programs often must be sought out by employees; however, there is great potential for formalized, City-wide training to emerge from these existing opportunities.

5) Internally, many departments reported supporting employees' memberships in professional organizations, and allowed for participation in professional networks, conferences, and continuing education opportunities.

6) Section 19 of the City code includes provisions for reimbursement of costs for formal college course work, and professional organization and license dues, at the discretion of the department head. Departments are free to establish employee development programs.

In summary, current training primarily addresses specific job requirements and as such, limits itself to departmental use. Training for advancement and management / supervisory / leadership skills are lacking and could be the area in which a City-wide training effort could have the greatest impact.

Appendix B: <u>Findings of Management Training Subcommittee</u>

The Management Training subcommittee was created to research topics and sources to provide training for supervisors.

This Management Training subcommittee recommends that training be divided into two categories. These two categories would include a training program for "New Supervisors" and "New Managers".

The training for "New Supervisors" could be phased in starting with departments having an immediate need for training based on expected retirements within the next five years.

Eligibility requirements for "New Supervisor" training would be based on length of employment, successful completion of probation period and special consideration for those filling a current supervisory role. The training for recently promoted, recently hired and current supervisors would be given priority.

The New Supervisors training courses would consist of four levels and would include courses as outlined below:

City Human Resources Personnel Skills (Level 1 - Mandatory)	City Supervisory Tools Training (Level 2 - Mandatory)
Chapter 19 Personnel Policies	Accident Reporting
Performance Review	Legal issues related to open records
Discipline	Records Retention
Hiring	City Purchasing Info
Legal Issues	Computer Training
Termination	City of Columbia "101"

Supervisory Soft Skills (Level 3)	Supervisory Advanced Skills (Level 4)
Time Management	Nuances of Public Management
Delegation	Being a Supervisor
Goal Setting	Leadership
Measuring Performance	Motivation
Communications	Coaching
Effective Meetings	Personality Skills
Employees/Teams	Team Building
Change / Self Management	Managing Virtual
Technology	Ethics / Office Politics
Recognizing Employees	Development / Mentoring
Management Resources	Management Trends
	Management Mistakes

The training for "New Managers" could be phased in starting with departments having an immediate need for training based on expected retirements within the next five years.

Eligibility requirements for "New Manager" training would be based on length of employment, successful completion of probation period and special consideration for those filling a current managerial role. The training for recently promoted, recently hired and current managers would be given priority.

The New Managers training courses would consist of two levels and would include courses as outlined below:

New Managers Tools Training (Level 1)	New Managers Soft Skills (Level 2)
Public Speaking	Motivational Skills
Problem Solving	Nuances of Public Leadership
Financial Planning / Budgets	Difference between Leadership and
Working with the Press	Management
Verbal Judo	Leadership & Relationships Communication
Conflict Resolution	Building Trust & Teamwork
Diversity Training	Building Collaboration
Environmental Issues	Creative Innovative Learning Cultures
Strengths Weaknesses Opportunity Threats	Creative Problem Solving
Analysis	Ethical Decision Making
Succession Planning	Understanding the Consequences of
	Decisions
	Value Based Virtual Problem Solving
	Developing Inner Qualities of Good
	Leadership
	Servant Leadership
	Creating Unity
	Leading Change

Level 1 and Level 2 of the Supervisors training would be coordinated internally by the facilitator. Additional training for both supervisor and manager categories would be provided by external vendors acquired through bids. The bid specifications would be recommended by the Workforce Strategy Committee and overseen by the Purchasing Division of the Finance Department. The Workforce Strategy Committee would work with the vendor selected to finalize course schedule and content.

Additionally the subcommittee recommends the City develop a mentoring program to compliment the supervisor and manager training. The subcommittee recognizes this would be helpful within departments but could also have a positive impact while crossing department lines. This would require the top-down cooperation and involvement of multiple City departments.

Quarterly, if not more often, supervisors and managers could job shadow another supervisor or manager in a different department and division. This would stimulate a team approach to City business and develop lines of communication that may not exist now. It would also allow for the exchange of ideas on topics most affecting these employees.

To close, the subcommittee recognizes that the above training would be a dynamic process. The training would need to be constantly scrutinized for effectiveness and modified where appropriate. The subcommittee also understands the huge commitment necessary by all those involved including management to make this a successful program

Appendix C: <u>Findings of Survey Subcommittee</u>

The WTSC Survey Subcommittee surveyed all of the City of Columbia employees who would be eligible to retire in the next year. There were 190 survey recipients, and we received 72 responses; a 38% response rate, which is normal for a non-incentive employee survey of under 1000 recipients. 67 respondents, or 93%, left their contact information and indicated that they would be willing to engage in further contact.

Recipients were asked to list the five skills/knowledge/experiences that they found critical to do their job. They were allowed to describe the skill in as much detail as possible in free-form text fields – there were no multiple choice questions. For each skill, the recipient also was asked to describe what, if anything was being done to "institutionalize" this knowledge, and what, if anything, a replacement would be able to draw upon to obtain that skill, knowledge, or experience.

We received a very broad range of skills, from Law Enforcement experience to Construction trades, to snow removal, to financial skills. The survey group condensed these skill types into 8 broader categories, such as "Trade Skills," and "City/Market Knowledge."

City/Market knowledge and Financial/Statistical skill categories generally involved skills that were specific to the City of Columbia – such as knowledge of City organization, roles, and structure or knowledge of the City financial systems. These are the types of skills that a new hire would not come aboard with. Of all the answers to the "What do you know" question, 49% involved these skill categories, indicating that the loss of these skills cannot be filled by hiring bright-eyed and bushy-tailed applicants (see Skills Graph1).

When asked what was being done to institutionalize this "City specific" knowledge, 37% of respondents either did not answer the question or wrote "nothing." 38% of respondents indicated that there was "informal documentation," or documentation in notebooks, desk manuals, and sticky notes as opposed to official department or organizational policy and procedure manuals (see Skills Graph 4).

When asked what new hires could do to obtain these "City specific" skills, 27% of the answers indicated that the knowledge or skill could be gained external from City resources – prior to or immediately following employment through higher education, attending specific training classes & seminars, obtaining certifications, or initiating other external research. Only 13% of the answers involved referencing available documentation or current laws & policies. 29% of the responses involved on-the-job training; On-the-job training generally means informal training or "learn as you go," and does not suggest a formal training program (see Skills Graph 5).

Out of the 190 surveyed, 104 were managers. In addition to the above questions, managers were also asked to describe the 5 skills that they found to be essential to being good managers.[6]

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[6] 104 out of 190 eligible to retire are managers. This means that more than half of the soon-to-be-open positions will involve not just a transfer of technical knowledge but also a transfer of managerial skills and experience.

Managers were asked to describe how a new manager could learn this skill, and if they had any suggestions on how the skill could be taught to a new manager.

Managers felt that the following managerial skills were critical to being good managers – Interpersonal relationship skills (38%), Communication skills (21%), and Planning/Project Management (20%).

When asked how new managers could acquire management skills, current managers either responded with "On the job" (25%) or left no response (25%). This indicates that for 50% of the essential management skill categories, new managers were left with no way to obtain these skills.

When asked for suggestions on teaching management skills to new managers, current managers responded that new managers should obtain management skills through formal training or cross training (35%). Many managers recommended on-the-job training (25%) for new managers. While on the surface one might assume that this means on-the-job training is most effective, this could suggest that current managers are unaware of other management preparation practices.

The following survey was distributed to employees eligible to retire

Date: Nov 17, 2009

To: Employees soon eligible for retirement

From: Workforce Talent Strategy Committee

Re: Attached Survey

This summer, the City Council discussed the issue of turnover in the City's workforce that will take place over the next few years. A significant number of the City's workers are nearing retirement age. These employees have amassed immense amounts of knowledge, skill, and experience that contribute to the goals of its citizens in ways that cannot be measured.

Unfortunately as we lose these individuals to retirement, the citizens lose the "institutional knowledge" it takes to meet their demands. Replacements for our retiring workers will need to be hired, and these replacements will need to "hit the ground running" and be prepared to fill some very large shoes. In September, a Talent Strategy Committee was appointed to "help insure that the City of Columbia's workforce, both now and in the future, is trained and capable to effectively provide the products and services directed by the Columbia City Council."

This committee has met to discuss these issues several times, and we have decided we need more information before we find solutions to identified problems. The folks nearing retirement surely weren't all successful right off the bat. We want to know what took place in order to make those individuals the valued contributors they are. We are contacting you because records indicate you will soon be eligible for retirement, and we want your input on how we can meet these goals.

The following survey was developed to gather your opinions. Please complete it as carefully and completely as you can by **5:00 p.m. on Tuesday, November 24th, 2009**. You may hand write, but feel free to type if you prefer and attach as many pages as necessary. When completed, please return it through inter-office mail in the self-addressed envelope.

The information you will provide in this survey will assist the committee in identifying the potential knowledge gap that may be created by your departure. We appreciate the opportunity to contact you and will ask for your contact information at the conclusion of the survey; however you have the option to remain anonymous.

If you have any questions or would prefer an electronic copy of this survey, please contact:

Danny Paul
IT Department
874-7482
jdpaul@gocolumbiamo.com

Thank you for your assistance with this project.

a. Please identify the knowledge, skills, and experiences that you feel allow you to effectively perform your job. **List your top 3-5 examples.** (Please feel free to contribute additional information beyond the space provided if desired.)

b. Tell us what, if anything, is being done to document your knowledge and skills.

c. How would your replacement acquire this knowledge?

a. Describe the knowledge, skill, or experience.	b. What is being done to document this?	c. How would your replacement acquire this knowledge?

Thank you for completing this survey. After compiling your comments, we would greatly appreciate the opportunity to speak to you directly for additional feedback. Please provide your contact information permitting the committee to follow up with you.

Contact information:

Name: _____

Department: _____

Division: _____

Phone: _____

E-mail: _____

Thank you again for your assistance. As a reminder, please return this survey by **5:00 p.m. on Tuesday, November 24th, 2009.**

Graph #1 shows the distribution of skill categories possessed by those approaching retirement.

Graph #2 shows what retirees are currently doing to "institutionalize" the knowledge and skills that they possess. The "No response," "On the job (as in 'thrown to the wolves')," and "Nothing" categories collectively represent 47% of the responses. Informal documentation (meaning desk manuals, personal notebooks, and NOT department issued P&P manuals) represent another 36%.

Graph #3 shows what new-hires could do to get up to speed on the recently-retiree's knowledge & skills. 31% of the responses to this question involved on-the-job training. Again, on the job training typically did not mean a formal training program as one might find new firefighter going through, but instead involved a "getting thrown to the wolves, learn as you go" training process. 39% of the responses indicated that a new hire could obtain their knowledge/skill externally through higher education, attending specific training classes & seminars, obtaining certifications, or initiating other external research.
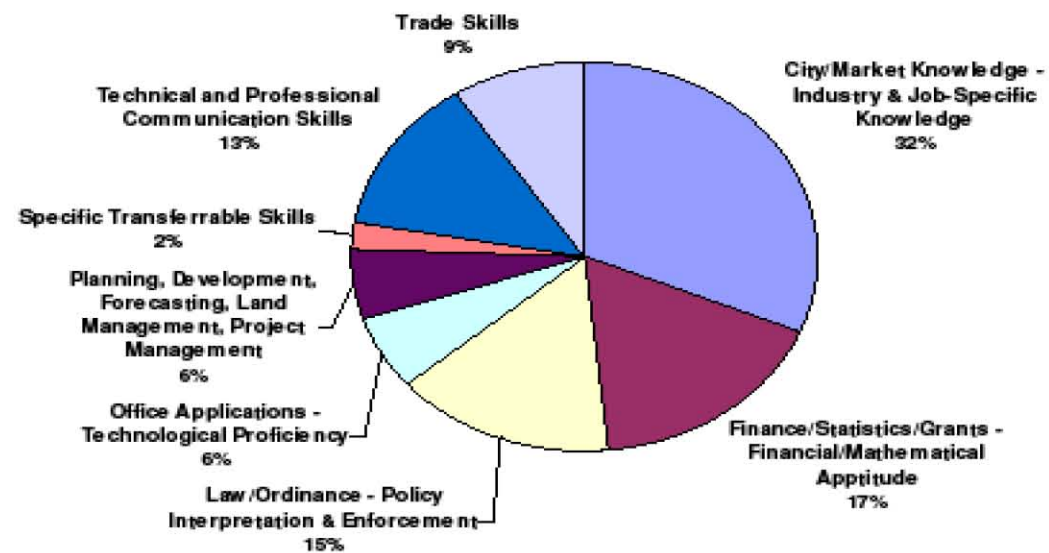
The two largest skill categories are "City/Market Knowledge" and "Finance/Statistics/Grants" and represent 49% of all of the skills that we will be losing. The disturbing thing about this is that in the City/Market Knowledge category, and to a lesser extent the Finance/Math category, the knowledge and skills being lost are very specific to City operations. It is therefore less likely that the City will be able to find applicants that possess these very unique skills. Finding this, the survey group elected to report data for those specific categories.

Graph #4 shows what future retirees are currently doing to institutionalize their City/Market/Financial knowledge & skills. 37% reported "Nothing" or "No response." 38% reported that informal documentation existed. Again, informal documentation refers to desk manuals and notebooks, and does not include official department issued P&P manuals. 21% indicated that the knowledge was being institutionalized through teamwork, cross training, or was learned on-the job (again, on the job generally indicates a learn-as-you-go process.)
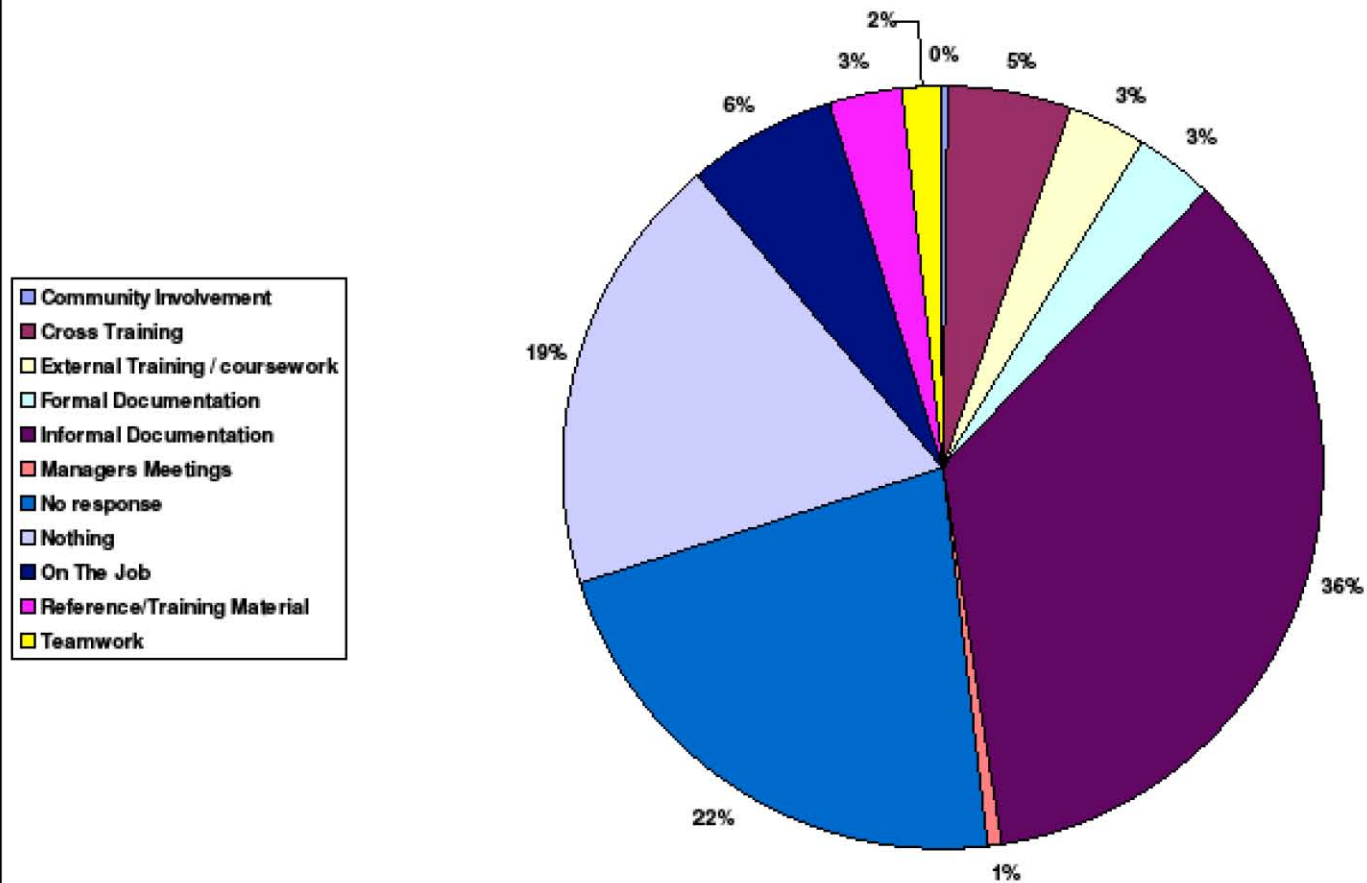
Graph #5 shows how new hires who require City/Market/Financial skills & knowledge might obtain the knowledge or skill. 27% of the answers indicated that the knowledge or skill could be gained external from City resources – prior to or immediately following employment through higher education, attending specific training classes & seminars, obtaining certifications, or initiating other external research. Only 13% of the answers involved referencing available documentation or current laws & policies. 29% of the responses involved on-the-job training.

8% of the responses in the City/Market/Financial skills & knowledge categories recommended computer training with an even split between requests for office applications/general use and Sungard software. While this seems statistically insignificant at first glance, it should be noted that a number of the respondents do not rely on office or Sungard applications to perform their jobs. The ones that do, however, appear to believe that this training is necessary and would make transition for a new employee much easier.

Count of Skill Categories in Distinct answers

Trade Skills
9%

Technical and Professional
Communication Skills
13%

City/Market Knowledge -
Industry & Job-Specific
Knowledge
32%

Specific Transferrable Skills
2%

Planning, Development,
Forecasting, Land
Management, Project
Management
6%

Office Applications -
Technological Proficiency
6%

Law/Ordinance - Policy
Interpretation & Enforcement
15%

Finance/Statistics/Grants -
Financial/Mathematical
Apptitude
17%

All Skill Categories - What's Currently Being Done

Legend:
- Community Involvement
- Cross Training
- External Training / coursework
- Formal Documentation
- Informal Documentation
- Managers Meetings
- No response
- Nothing
- On The Job
- Reference/Training Material
- Teamwork

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All Skill Categories - How Replacements Gain Skill

Legend:
- ☐ Attend managers meetings
- ■ College experience
- ☐ Community involvement & engagement
- ☐ External research
- ■ External training / certification
- ■ New hire should have
- ■ No response
- ☐ Office Applications Training
- ■ On the job/internal training
- ■ Prior experience (Previously employed in that capacity)
- ☐ Refer to internal documentation
- ☐ Study of city charter, structure, finances
- ■ Sungard Software Training
- ■ Trade Experience
- ■ Work with outgoing

Pie chart values: 1%, 0%, 8%, 1%, 2%, 16%, 5%, 6%, 2%, 31%, 11%, 9%, 3%, 3%, 2%

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City/Market & Finance/Math Skill Categories - What's Currently Being Done

Legend:
- Community Involvement
- Cross Training
- External Training / coursework
- Formal Documentation
- Informal Documentation
- Managers Meetings
- No response
- Nothing
- On The Job
- Reference/Training Material
- Teamwork

Pie chart values: 2%, 1%, 6%, 2%, 3%, 3%, 7%, 14%, 38%, 1%, 23%

City/Market & Finance/Math Skill Categories - How Replacements Gain Skill

Legend:
- Attend managers meetings
- College experience
- Community involvement & engagement
- External research
- External training / certification
- New hire should have
- No response
- Office Applications Training
- On the job/internal training
- Prior experience (Previously employed in that capacity)
- Refer to internal documentation
- Study of city charter, structure, finances
- Sungard Software Training
- Trade Experience
- Work with outgoing

Pie chart values: 1%, 0%, 7%, 2%, 2%, 16%, 3%, 6%, 4%, 29%, 11%, 11%, 2%, 4%, 2%

<u>The following survey was distributed to managers eligible to retire</u>

Date: Nov 17, 2009

To: Employees soon eligible for retirement

From: Workforce Talent Strategy Committee

Re: Attached Survey

This summer, the City Council discussed the issue of turnover in the City's workforce that will take place over the next few years. A significant number of the City's workers are nearing retirement age. These employees have amassed immense amounts of knowledge, skill, and experience that contribute to the goals of its citizens in ways that cannot be measured.

Unfortunately as we lose these individuals to retirement, the citizens lose the "institutional knowledge" it takes to meet their demands. Replacements for our retiring workers will need to be hired, and these replacements will need to "hit the ground running" and be prepared to fill some very large shoes. In September, a Talent Strategy Committee was appointed to "help insure that the City of Columbia's workforce, both now and in the future, is trained and capable to effectively provide the products and services directed by the Columbia City Council."

This committee has met to discuss these issues several times, and we have decided we need more information before we find solutions to identified problems. The folks nearing retirement surely weren't all successful right off the bat. We want to know what took place in order to make those individuals the valued contributors they are. We are contacting you because records indicate you will soon be eligible for retirement, and we want your input on how we can meet these goals.

The following survey was developed to gather your opinions. Please complete it as carefully and completely as you can by **5:00 p.m. on Tuesday, November 24th, 2009**. You may hand write, but feel free to type if you prefer and attach as many pages as necessary. When completed, please return it through inter-office mail in the self-addressed envelope.

The information you will provide in this survey will assist the committee in identifying the potential knowledge gap that may be created by your departure. We appreciate the opportunity to contact you and will ask for your contact information at the conclusion of the survey; however you have the option to remain anonymous.

If you have any questions or would prefer an electronic copy of this survey, please contact:

Danny Paul
IT Department
874-7482
jdpaul@gocolumbiamo.com

Thank you for your assistance with this project.

  a. Please identify the knowledge, skills, and experiences that you feel allow you to
     effectively perform your job. **List your top 3-5 examples**. (Please feel free to
     contribute additional information beyond the space provided if desired.)

  b. Tell us what, if anything, is being done to document your knowledge and skills.

  c. How would your replacement acquire this knowledge?

a. Describe the knowledge, skill, or experience.	b. What is being done to document this?	c. How would your replacement acquire this knowledge?

Many managers require skills in addition to the technical skills of their employees. For example, managers may need to know how to motivate and discipline employees, resolve conflicts, and identify and respond to different personality types

  a. **List the top 3-5 skills** you believe a new manager needs before he/she is
     promoted to a leadership/supervisory position?
  b. How would a new manager/supervisor learn these skills?
  c. Do you have any suggestions on teaching these skills to a new
     manager/supervisor?

a. Describe the managerial skill	b. How would a new manager learn this skill?	c. Do you have any suggestions on teaching this skill to a new manager?

Thank you for completing this survey. After compiling your comments, we would greatly appreciate the opportunity to speak to you directly for additional feedback. Please provide your contact information permitting the committee to follow up with you.

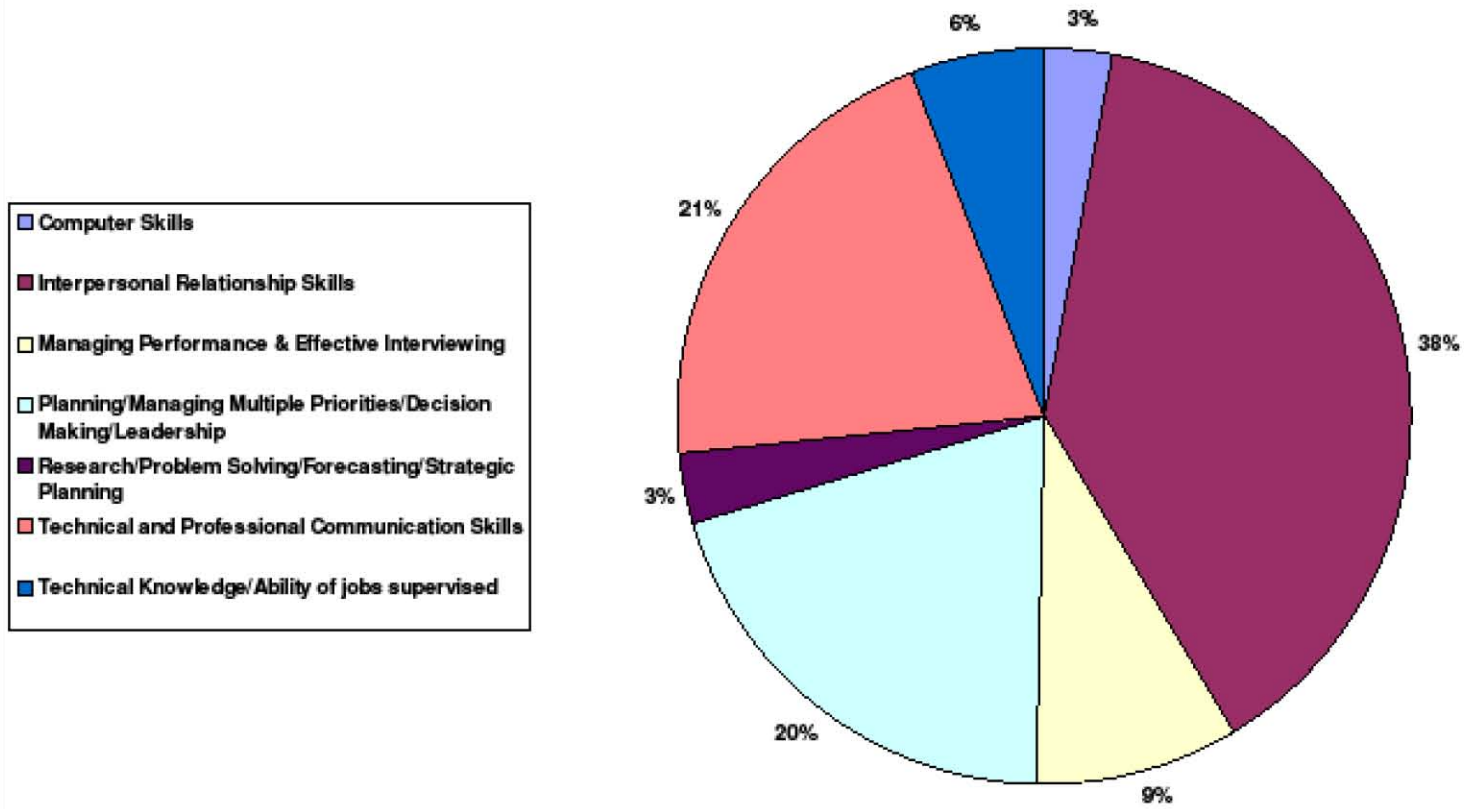Contact information:

Name: _____

Department: _____

Division: _____

Phone: _____

E-mail: _____
Thank you again for your assistance. As a reminder, please return this survey by **5:00 p.m. on Tuesday, November 24th, 2009.**

Skills Managers Need

Legend:
- Computer Skills
- Interpersonal Relationship Skills
- Managing Performance & Effective Interviewing
- Planning/Managing Multiple Priorities/Decision Making/Leadership
- Research/Problem Solving/Forecasting/Strategic Planning
- Technical and Professional Communication Skills
- Technical Knowledge/Ability of jobs supervised

Pie chart values: 3%, 38%, 9%, 20%, 3%, 21%, 6%

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How Replacement Managers Learn - All Skill Categories

Legend:
- College Level Training
- Continued Support By Upper Management
- Cross Training
- Innate Skills
- Internal Documentation
- Internal/External Training Class
- Mentoring
- No Answer
- On the Job Experience
- Open Communication with Subordinates - Know Your Staff
- Seminar
- Sound Decision Making
- Train on Subordinates Positions

25
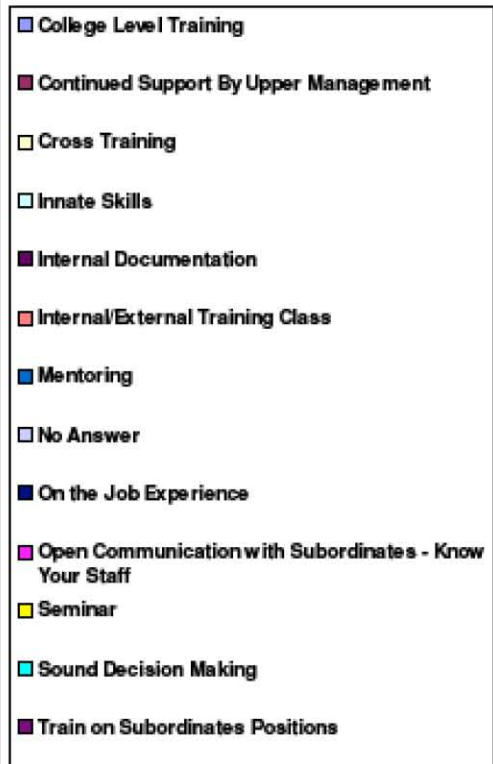
Recommendations on How To Teach Managerial Skills - All Skill Categories

Legend:
- Already Possess Skills When Hired
- Awareness
- Crosstraining
- Develop Mission Statement
- Identify Strengths and Weaknesses of Subordinates
- Innate Skills
- Internal Training Program
- Internal/External Training Class
- Know Subordinates
- No Response
- Nothing
- On The Job Experience
- Open Communication with Subordinates
- Promote From Within
- Regular Staff & Manager Meetings
- Train on Subordinates Positions

Pie chart values: 3%, 2%, 12%, 2%, 2%, 2%, 1%, 23%, 1%, 15%, 3%, 25%, 2%, 2%, 1%, 4%

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How Replacement Managers Learn - Interpersonal Skills

Legend:
- College Level Training
- Continued Support By Upper Management
- Innate Skills
- Internal Documentation
- Internal/External Training Class
- Mentoring
- No Answer
- On the Job Experience
- Open Communication with Subordinates - Know Your Staff
- Seminar
- Train on Subordinates Positions

Pie chart values: 5%, 3%, 1%, 1%, 26%, 7%, 20%, 22%, 8%, 4%, 3%
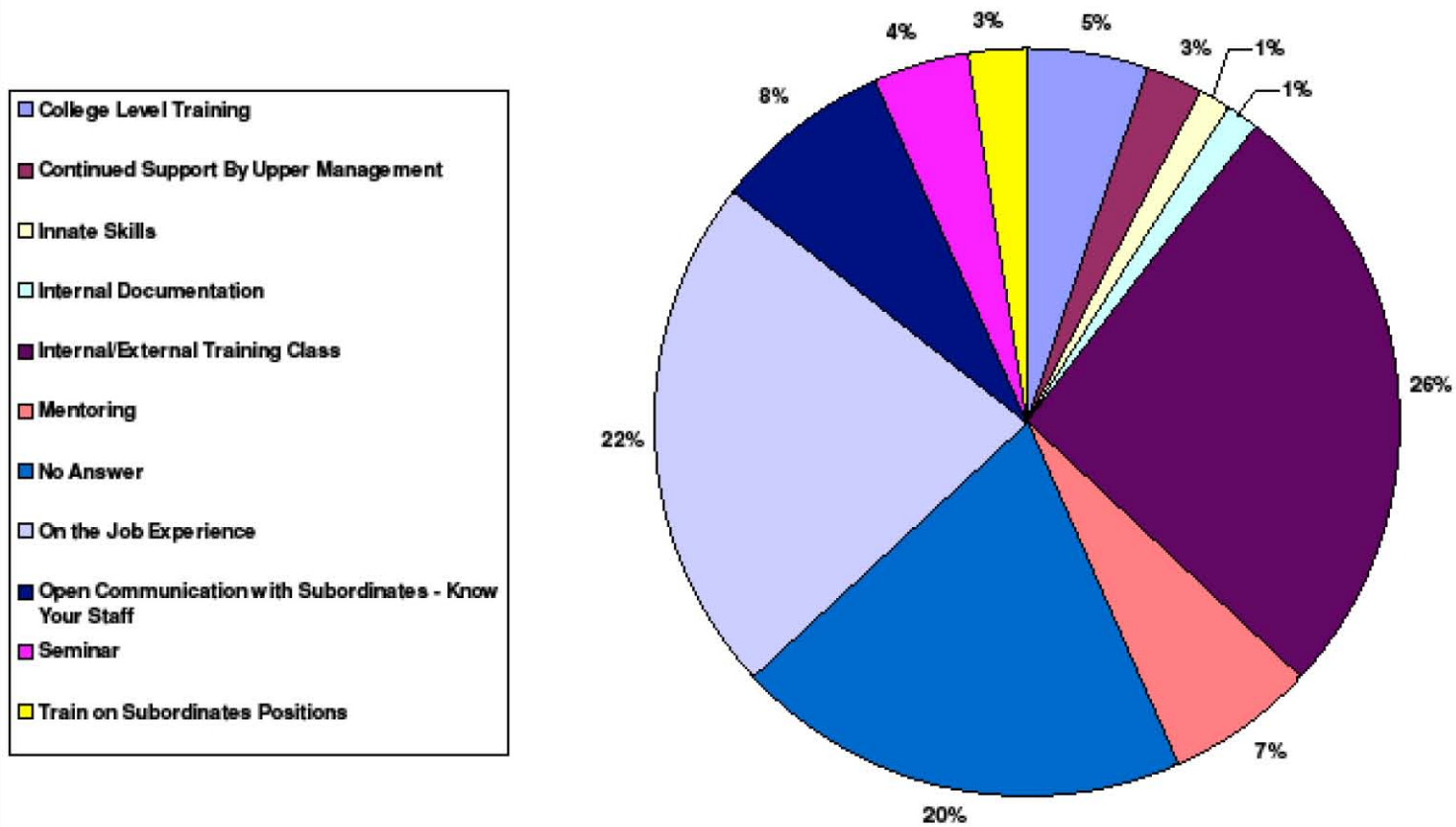
Recommendations on How to Teach Interpersonal Skills

Legend:
- Already Possess Skills When Hired
- Awareness
- Crosstraining
- Develop Mission Statement
- Identify Strengths and Weaknesses of Subordinates
- Innate Skills
- Internal Training Program
- Internal/External Training Class
- No Response
- Nothing
- On The Job Experience
- Open Communication with Subordinates
- Promote From Within
- Regular Staff & Manager Meetings
- Train on Subordinates Positions

Pie chart values: 1%, 3%, 3%, 3%, 3%, 15%, 1%, 3%, 6%, 1%, 20%, 13%, 4%, 23%, 1%

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Appendix D: Resources, Development and Retention Subcommittee

FRAMEWORK (page 1)

FRAMEWORK (page 2)

RESOURCES

DEVELOPMENT

RETENTION

KNOWLEDGE PRESERVATION O-1

ORGANIZATIONAL KNOWLEDGE O-3

MANAGEMENT Q-2

TANGIBLE BENEFITS O-6 (2)

INTANGIBLE BENEFITS O-2 (6)

MANAGEMENT ACADEMY O-5

INTER-DEPARTMENTAL CROSS TRAINING O-3

FRONTLINE — INTERMEDIATE — SENIOR

TRADES

ADMINISTRATIVE

ON THE JOB   MENTORING
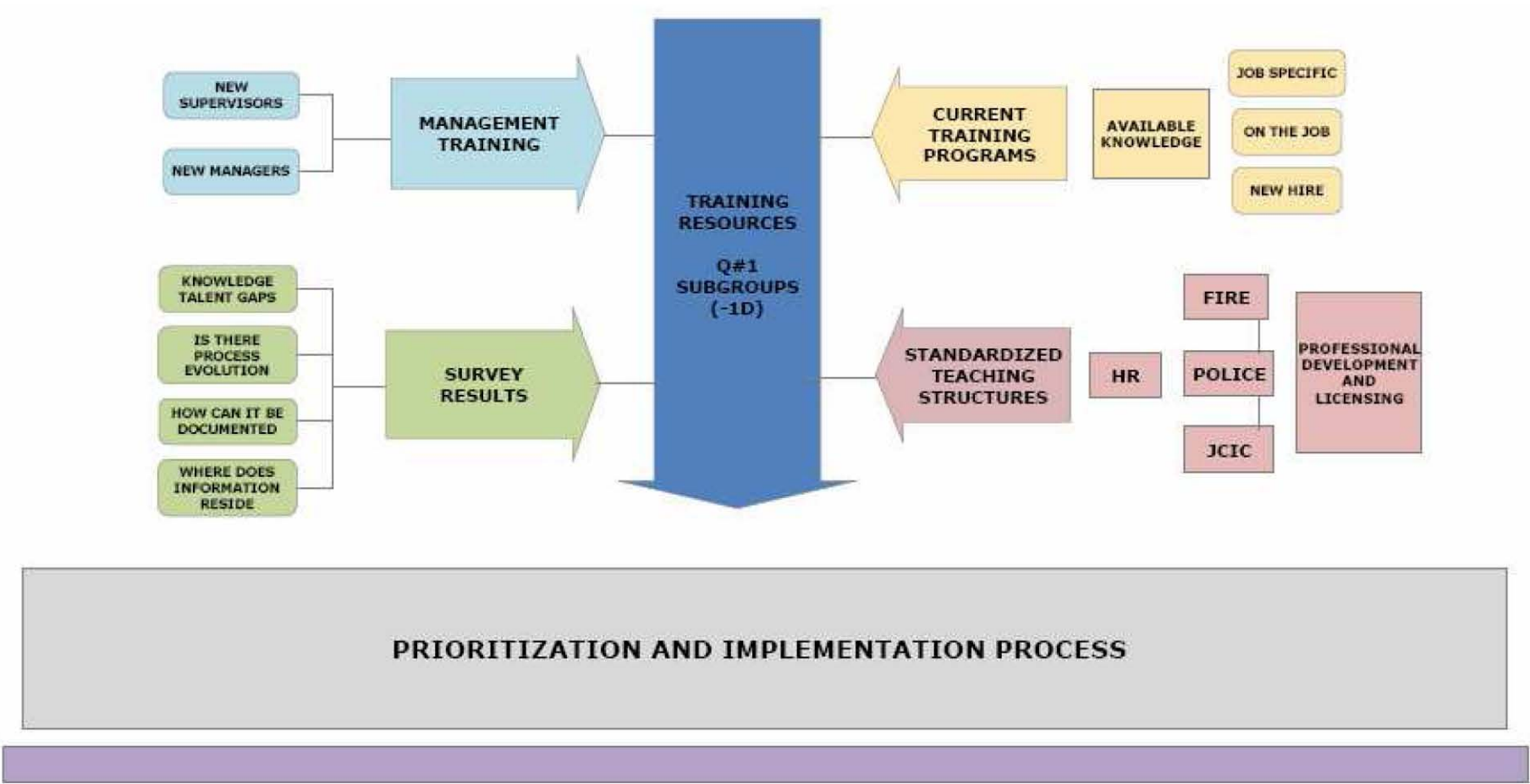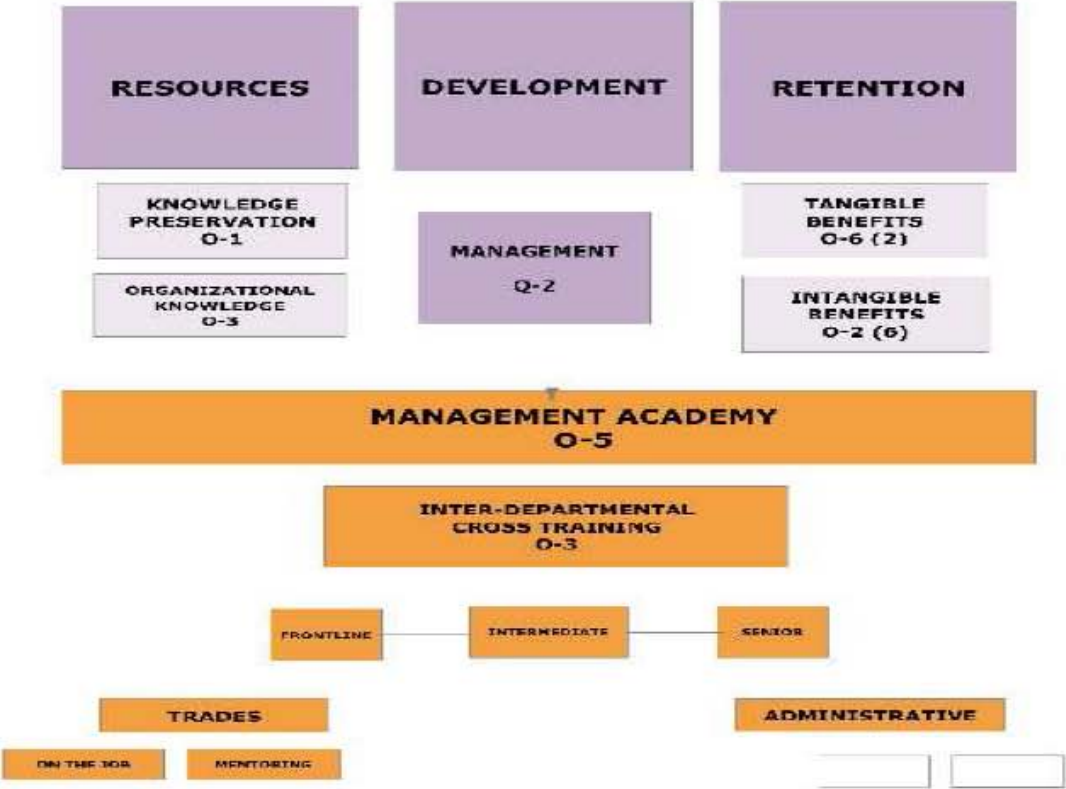
Appendix E: Retirement Eligibility Spreadsheets

Department	Total Dept Employees	Eligible in 5 Years or Less	% Dept Eligible in 5 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
Retirement Eligibility, Department-wide							
City Manager's Office	8	3	38%	1	13%	0	0%
Clerk's Office	3	0	0%	0	0%	0	0%
Convention & Visitors Bureau	9	2	22%	1	11%	0	0%
Cultural Affairs	3	0	0%	0	0%	0	0%
Economic Development	3	1	33%	0	0%	0	0%
Employee Benefit Fund	4	0	0%	0	0%	0	0%
Finance	54	14	26%	8	15%	7	13%
Fire, Non-uniformed	4	3	75%	3	75%	3	75%
Health	63	13	21%	2	3%	2	3%
Human Resources	9	3	33%	1	11%	1	11%
Information Technologies	26	5	19%	1	4%	0	0%
Law	10	2	20%	2	20%	2	20%
Municipal Court	9	3	33%	1	11%	1	11%
Neighborhood Services	9	4	44%	2	22%	2	22%
Office of Sustainability	2	0	0%	0	0%	0	0%
Parks & Recreation	78	14	18%	6	8%	6	8%
Planning	12	4	33%	2	17%	2	17%
Police, Non-uniformed	33	5	15%	3	9%	3	9%
PSJC	33	2	6%	2	6%	2	6%
Public Communications	11	1	9%	0	0%	0	0%
Public Works	358	64	18%	38	11%	27	8%
Water & Light (incl. Railroad)	251	64	25%	40	16%	32	13%

Department	Total Dept Employees	Eligible in 2 Years or Less	% Dept Eligible in 2 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
Fire, Uniformed	136	21	15%	19	14%	13	10%
Police Uniformed	158	20	13%	17	11%	11	7%

Department	Managers or Supervisors	Eligible in 5 Years or Less	% of Managers/Supervisors Eligible in 5 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
City Manager's Office	4	2	50%	0	0%	0	0%
Clerk's Office	1	0	0%	0	0%	0	0%
Convention & Visitor's Bureau	1	1	100%	1	100%	0	0%
Cultural Affairs	2	0	0%	0	0%	0	0%
Economic Development	1	0	0%	0	0%	0	0%
Employee Benefit Fund	1	0	0%	0	0%	0	0%
Finance	14	6	43%	4	29%	4	29%
Fire, Non-uniformed	0	0	0%	0	0%	0	0%
Health	14	4	29%	1	7%	1	7%
Human Resources	1	0	0%	0	0%	0	0%
Information Technologies	22	2	9%	1	5%	0	0%
Law	5	2	40%	2	40%	2	40%
Municipal Court	2	1	50%	0	0%	0	0%
Neighborhood Services	1	0	0%	0	0%	0	0%
Office of Sustainability	1	0	0%	0	0%	0	0%
Parks & Recreation	44	9	20%	5	11%	5	11%
Planning	4	1	25%	0	0%	0	0%
Police, Non-uniformed	3	0	0%	0	0%	0	0%
PSJC	8	2	25%	2	25%	2	25%
Public Communications	4	0	0%	0	0%	0	0%
Public Works	101	31	31%	17	17%	15	15%
Water & Light	97	43	44%	27	28%	19	20%

Retirement Eligibility, Managers and Supervisors Only

Department	Managers or Supervisors	Eligible in 2 Years or Less	% of Managers/Supervisors Eligible in 2 Years or Less	Eligible in 1 Year or Less	% Eligible in 1 Year or Less	Eligible Now	% Eligible Now
Fire, Uniformed	52	16	31%	15	29%	10	19%
Police Uniformed	29	6	21%	5	17%	3	10%

Appendix F: Presentation to City Manager

Survey Results

1). Distribution of Skill Categories
2). Institutionalization of Retiree Knowledge
3). Methods of Knowledge Acquisition for New Hires

Knowledge Acquisition and Implementation

1). Internal Learning Academy
2). External Learning Partnerships
3). Mentoring Programs

Workforce Talent Strategy Committee

Current Training Methods

1). Job Specific
2). On The Job
3). New Hire
4). Available Knowledge
5). Professional Development

Management Training

1). New Supervisors
2). New Managers

Workforce Talent Strategy Committee
Current Training Methods

Workers in ten departments were asked what
training programs or classes are currently available

- <u>Job Specific:</u> Professional or legal standards require the most structured training programs to stay compliant with occupational standards.

-       Police
-       Fire
-       Airport Safety
-       Joint Communications

Workforce Talent Strategy Committee

Current Training Methods

On The Job: A substantial part of departmental learning exists in the form of on-the-job training. Employees hired with particular job skills are expected to immediately perform the duties required to complete the job.

It is generally up to the employee to ask for help.

Workforce Talent Strategy Committee

Current Training Methods

<u>New Hire:</u> Initial entry level and required training
appears to be the strongest.

Training for advancement within a department is
generally lacking, particularly for supervisory or
management level opportunities.

Workforce Talent Strategy Committee

Current Training Methods

<u>Available Knowledge:</u> At the present time all
learning structures generally must be sought out
by employees; however, there is great potential
for formalized City-wide training to emerge from
these existing opportunities.

Workforce Talent Strategy Committee

Supervisory and Management

Management training should be divided into programs for New Supervisors and New Managers. Departments with immediate needs would be a priority.

Workforce Talent Strategy Committee

Supervisory and Management

New Supervisors training course would consist of four levels

Human Resources Personnel Skills
Supervisory Administration
Supervisory Soft Skills
Supervisory Advanced Skills

Workforce Talent Strategy Committee

Supervisory and Management

New Managers training course would consist of two levels

New Manager Training (Level1)
New Manager Soft Skills (Level 2)

Workforce Talent Strategy Committee

Supervisory and Management

Apprenticeship Opportunities
Mentoring Programs
Job Shadowing

Workforce Talent Strategy Committee

Survey Results

Survey participants were eligible retirees. Our goal was to determine skills that would be lost with retirement of employees.

Workforce Talent Strategy Committee

Survey Results

We asked the following of recipients

- List top five skills
  - Describe skill retention process
  - Methods of knowledge transfer

- List top five management skills
  - How are these skills learned
  - What recommendations do you have

Workforce Talent Strategy Committee

Survey Results

- Of the skills identified 49% were City specific
  - No formal retention process for at least 75% of those skills
- Management skills needed - 91% were not job specific

Workforce Talent Strategy Committee

Methods Of Implementation

Facilitator dedicated to organize, create and maintain the acquired knowledge of the City within an internal data library

This information will be accessible City-wide and will be available in a wide variety of formats; text, video recordings, taped seminars etc.

Workforce Talent Strategy Committee

Methods Of Implementation

Individuals Eligible For Retirement In The Next Year

- Identify ten topics that are vital to the functionality of the job
- Create database of information gathered from retiring personnel
- Incentivize retirees to give 90 days notice to allow for overfill
- Overfill position with new hire a minimum of ten days

Workforce Talent Strategy Committee

Methods Of Implementation

Long Range Goals – 3 to 5 Years

- Create methods for acquiring institutional knowledge from retiring personnel
- Examine existing systems from Police, Fire, Emergency Services to aid in building City-wide training procedures
- Create Management Academy to organize and provide database of institutional knowledge
- Management Academy will serve as the reference source for information and seminar opportunities