

**MONTEREY COUNTY HUMAN RESOURCES CENTRALIZATION
GAT (GOALS/ACCOMPLISHMENTS/TIMELINES) REPORT**

(Version **14** for BOS HR Committee Meeting on **March 5, 2015**; **BOLD** denotes new added text from **October 17, 2014** meeting and new activity after **October 17, 2014**)

Project Area #	Project Description	Status	Goal Date
1	Recruit, choose, orient Human Resources (HR) Leadership	Assistant HR Director and Principal Labor and Employee Relations Analyst to be filled.	February 2014 COMPLETED
2	Update HR Policies and Personnel Services Manual (PSM); re-evaluate Personnel Systems	Kim Moore in Central HR assumed the lead for the HR policies. She will have technical support from Dianne Dinsmore (Health) and Dannie Ryan (Probation). PSM is not currently under review. A team of HR staff has volunteered to update the Recruitment Planning Process, Examination Process, and Staffing & Referral for Final Selection portions with assistance from the LOD team. Re-evaluation of Personnel Systems is complete. PPPR revisions underway; to BOS in 2015. Onboarding Resource Project Completed.	See timelines below for 2a – 2k. PSM Sections Recruitment Planning Process, Examination Process, and Staffing & Referral for Final Selection goal is 12/31/15.
2a	Review of current policies for Mandatory, Leave, Compensation and Internal Protocols and where they are located	Completed	March 20, 2012
2b	Report to BoS HR Committee of Policies being reviewed	Completed	April 11, 2012
2c	All policies posted in one place	Completed	June 2012
2d	Review of Essential Policies to ensure County's are current with all legal amendments	Five highest priority projects identified as: Leave Management Policies; Increases for Temporary Employees; Working Out of Class; Temporary Assignment Pay; and Acting Appointments.	July 2012 – July 2014
2e	Leave Management Re-Engineering Project	Leave Management Re-engineering Project, began in February 2012, resulting in development of new policy, to be reviewed by employee bargaining units, and subsequently to be sent to Board of Supervisors for approval; will also include finalization of companion Leave Guide for supervisors and employees. <ul style="list-style-type: none"> Meetings held with, and feedback received from interested employee groups; to BOS in 2014. Implementation delayed due to staffing concerns. A team of HR staff has volunteered to move the Leave Management project forward. 	July 2015
2f	Increases for Temporary Employees Policy	Same as 2D	
2g	Working Out of Class Policy	Same as 2D	
2h	Temporary Assignment Pay Policy	Same as 2D	
2i	Acting Appointments Policy	Same as 2D	
2j	Exit Interview Process	Underway – Reviewing potential contractors.	June 2014 Completed
2k	Position Control/Management Re-engineering	Underway	January 2014 July 2014
3	Re-evaluate Personnel Systems (moved to Project Area #2)	This is included in and moved to the above "Update HR Policies" (Project Area #2).	
4	Develop/Implement Comprehensive HR IT Plan	Review of the HR Info Systems function has been completed and is under review by the HR Director.	LONG TERM PROJECT
5	Centralize selected HR Functions	HR Director requesting positions to centralize certain	July 2015

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	(Leave Management)	Advantage HRM transactions; leave management reengineering project recommends centralization of leave management, requiring additional staff resources. Delayed due to staffing concerns. A team of HR staff has volunteered to move the Leave Management project forward.	
6	Implement and track HR Goals and Metrics	Collected Best HR Practices in Public Sector in California and examples of HR Metrics; provided to BOS HR Committee at 4-11-12 Special Meeting.	July 2013
7	Signed MOUs/Service Agreements with Departments/Agencies	Health, Office of the Sheriff, COB, RMA, and DSS has signed MOU or Service Agreements in place. Meetings have been held with Emergency Communications, WRA and Elections with Agreements not yet finalized. County Counsel, BOS, ED/WIB, Equal Opportunity, WRA, Elections and the CAO continue to rely upon Central Human Resources for their HR needs. Discussions will continue with the balance of County departments to achieve 100% participation goal.	July 2014
8	Strategic Partnering	Measurement of progress in this area is included in Project Area #7.	
9	Develop roles/responsibilities/procedures/processes for HR Central and departmental work (Scope of Work document)	This project assigned to the HR Centralization Steering Committee by BOS HR Committee on July 11, 2012. Completed; may be revised as HR Department structure is developed. Scope of Work document posted on the HR Centralization Steering Committee webpage.	Completed
10	Develop HR Centralization Transition Plan	Began on 9/12/11. This project will continue as each Department signs a Centralization Agreement. Departmental HR Centralization Status List is posted on HR home webpage.	Ongoing to completion.
11	Develop HR Communication Plan	Currently, HR Link meetings have Centralization as an ongoing agenda item. Central HR is developing a "Who Do You Call" list for various HR responsibilities. That will be provided to each department and posted on the County's website. The HR Centralization Steering Committee is also a vital part of the HR Communication Plan, as are the BOS HR Committee meetings. There is a Communication Advisory Committee that is responsible for developing various communication opportunities. Steering Committee to reinstate Communication Advisory Committee meeting schedule in 2013.	July 1, 2012 FY
12	Evaluate need for Department level standardized HR procedures	This is included in Item #2 "Update HR Policies and PSM" and "Develop/Implement Comprehensive HR IT Plan" (Item #4). Steering Committee representatives are managing this project.	July 2012 – July 2014
13	Develop training programs/updated policies/procedures/positions	Learning and Organizational Development (LOD) unit conducted surveys, a focus group and an SME interview. Possible Winter 2014/15 workshop topics include: Class and Comp, Developing Examinations, ADA, Policy Interpretation, HRM System, and Change Management. Workshops are in lieu of HR (14 week) Academies since Academies are only provided in alternate years. The Finance and Accounting and Leadership Academies were offered in 2013. # Workshops contingent upon availability of SME facilitators to support LOD's 1.5 trainers. LOD also to train all County employees in three mandatory trainings aligned with BoS Strategic Initiatives.	7/1/12 – 7/13; Ongoing

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14	Develop HR Performance review	See Human Resources Policies Review Report (Project Area #2)	COMPLETED
15	Project management that enables completion of HR Centralization	A Scope of Work Plan has been developed and was presented to the Steering Committee on 3/15/12; additional review done by the Steering Committee at their monthly meetings.	3/15/12