

ALAMEDA-CONTRA COSTA TRANSIT DISTRICT



STAFF REPORT

MEETING DATE: 4/24/2024

Staff Report No. 24-096

TO: AC Transit Board of Directors
FROM: Michael A. Hursh, General Manager/Chief Executive Officer
SUBJECT: New and Revised Classifications

ACTION ITEM

AGENDA PLANNING REQUEST:

RECOMMENDED ACTION(S):

Consider adoption of Resolution No. 24-007 approving a new classification series for the Retirement Plan, including the revised classifications of Executive Officer Retirement Plan, Principal Retirement Plan Analyst, Retirement Plan Analyst, and Retirement Plan Assistant Analyst as well as the new classifications of Deputy Executive Officer Retirement Plan, Senior Retirement Plan Analyst and Retirement Plan Associate Analyst.

Staff Contact:
Sebron Flenau III, Executive Director of Human Resources

STRATEGIC IMPORTANCE:

Goal - High-Performing Workforce
Initiative - Employee Recruitment, Training, and Retention

Classification specifications are essential for various aspects of human resources management influencing personnel decisions and contributing to the District's strategic goals and initiatives. Current classification specifications serve as a foundation for a variety of human resources functions that include talent management (recruitment and retention strategies), workforce development, and compensation determination.

BUDGETARY/FISCAL IMPACT:

There is no fiscal impact associated with the creation and revision of these classifications.

BACKGROUND/RATIONALE:

Staff is recommending the approval of the following of the new classification series for the Retirement Plan, including new and revised classifications. The new classifications are as follows: Deputy Executive Officer Retirement Plan, Senior Retirement Plan Analyst, and Retirement Plan Associate Analyst. The revised classifications are as follows: Executive Officer Retirement Plan, Principal Retirement Plan Analyst, Retirement Plan Analyst, and Retirement Plan Assistant Analyst.

It should be noted that proposed new and revised classifications are part of a proactive planning process in which the Human Resources Classification and Compensation Unit collaborated extensively with the Retirement Plan to modernize and increase the scope of the Retirement classification series. All represented classifications, new and revised, (Principal Retirement Plan Analyst, Senior Retirement Plan Analyst, Retirement Plan Analyst, Retirement Plan Associate Analyst, Retirement Plan Assistant Analyst) were sent to AFSCME 3916 for their review and acknowledgment.

The Retirement Board reviewed and approved the proposed classification series on December 19, 2023. This series is comprised of seven (7) classifications and is visually depicted in the attached Career Ladder Retirement Plan Series. An organizational chart has been included to show the Retirement Department's structure with the new and revised classifications.

The Retirement Plan classification series will further a new vision for the management of retirement benefits and assets, as well as a desire for extensive outreach and customer service for future and existing District retirees. This new vision requires the expansion of the retirement classification series to reflect more modern titles and duties that align with the external market providing opportunities for promotion and succession planning. The robust, updated retirement classification series will be able to adapt to changing business needs and facilitate the short-, medium-, and long-term goals of the Retirement Plan. This is especially relevant with the implementation of PEPRA and the increased workload with having a "classic" and "PEPRA" two-tiered retirement plan. The increased workload and administration necessitated two new positions at mid-year FY 23/24 and the proposed revised classification series to manage the current, backlogged, and future work.

New Classifications:

Deputy Executive Officer Retirement Plan

This is a new, senior management classification that assists the Executive Officer in directing the functions, activities, and staff within the Retirement Department. The position will act on behalf of the Executive Officer in their absence. This classification completes the Retirement Department's classification series contributing to the department's strategic objectives of career progression and succession planning. There is no budgeted position assigned to this classification, as it being reserved for future use when the next phase of the department's vision necessitates adding an approved budgeted position. This classification is assigned to Unrepresented Salary Plan Grade 13 and reports to the Executive Officer Retirement Plan.

Senior Retirement Plan Analyst

This is a new classification defined as the advanced, lead level and provides technical and functional direction to staff. One budgeted position, with no current incumbent assigned to this classification, was approved at the mid-year review of the FY 23-24 annual budget. This classification is assigned to AFSCME Salary Plan Grade 7 and reports to the Executive Officer Retirement Plan.

Retirement Plan Associate Analyst

This is a new classification defined as an emerging, para-professional analyst level within the series. The series is flexibly staffed from the Assistant Analyst to the Analyst level. One budgeted position, with an incumbent currently assigned to this classification, was approved at the mid-year review of the FY 23-24 annual budget. This classification is assigned to AFSCME Salary Plan Grade 4 and reports to the Executive Officer Retirement Plan.

Revised Classifications:**Executive Officer Retirement Plan**

This classification, formerly the Retirement System Manager, is the department head and Retirement Board Officer reporting directly to the Retirement Board. The title is revised to align with industry peers. One budgeted position, with an incumbent currently assigned to this classification, is included in the Retirement Plan Department's budget. This classification is unrepresented with an individual compensation and benefits contract entered into with the Retirement Board.

Principal Retirement Plan Analyst

This classification, formerly the Retirement System Administrator, is defined as the technical subject matter expert (SME) and is the professional, supervisory level within the series. One budgeted position, with an incumbent assigned currently to this classification, is included in the Retirement Plan Department's budget. This classification is assigned to AFSCME Salary Plan Grade 9 and reports to the Executive Officer Retirement Plan.

Retirement Plan Analyst

This classification, formerly the Retirement System Analyst, is defined as the experienced, professional-level analyst within the series. The series is flexibly staffed from the Assistant Analyst to the Analyst level. One budgeted position, with an incumbent currently assigned to this classification, is included in the Retirement Plan Department's budget. This classification is assigned to AFSCME Salary Plan Grade 5 and reports to the Executive Officer Retirement Plan.

Retirement Plan Assistant Analyst

This classification, formerly the Retirement System Assistant, is defined as the entry, training, and administrative support level. The series is flexibly staffed from the Assistant Analyst to the Analyst level. One budgeted position, with no incumbent currently assigned to this classification, is included in the Retirement Plan Department's budget. This classification is assigned to AFSCME Salary Plan Grade 3 and reports to the Executive Officer Retirement Plan.

ADVANTAGES/DISADVANTAGES:

The advantages of revising and creating classification specifications are critical to ensure that they are aligned with business needs, create consistency with industry standards, and facilitate clear paths for career development, internal promotional opportunities, and succession planning. There are no identified disadvantages to updating or creating new classification specifications.

ALTERNATIVES ANALYSIS:

The alternative approach is to continue using the District's classifications in their current form, which is not recommended. The current classification specifications do not meet business needs, facilitate functional career paths, nor do they contribute to or improve workforce development, or talent management strategies.

PRIOR RELEVANT BOARD ACTION/POLICIES:

None.

ATTACHMENTS:

1. Resolution No. 24-007 and related Exhibits
2. Career Ladder Retirement Plan Series
3. Retirement Plan Organizational Chart

Prepared by:

Anne Kennedy Hayes, Management Analyst
Emily Cruz, Human Resources Manager
Damien Charléty, Retirement System Manager

Approved/Reviewed by:

Sebron Flenaugh III, Executive Director of Human Resources
Chris Andrichak, Chief Financial Officer
Shayna van Hoften, Interim General Counsel/Chief Legal Officer