

Olivehurst Public Utility District



Agenda Item Staff Report

Meeting Date: October 17, 2019

Item description/summary:

Update of the OPUD Lateral Transfer and Promotion Policy to include management positions. This item was discussed in all committees. The current policy doesn't include management positions allowing for hourly or other management employees to transfer into management positions. The policy was originally written to encourage promotion from within as an incentive for service with the District and those incentives are limited to hourly rated positions currently. However, with particular management positions, the Board may wish to recruit from outside, as well as inside, the District and the updated policy allows for that. The bottom line is that the updated policy will provide access for employees to transfer into management positions that were not previously covered under this policy.

Fiscal Analysis:

N/A

Employee Feedback

Very positive

Sample Motion:

Move to approve the updated OPUD Lateral Transfer and Promotion Policy.

Prepared by:

John Tillotson, P.E., General Manager



OLIVEHURST PUBLIC UTILITY DISTRICT

Effective Date: 10-19-2019
Revision 2

LATERAL TRANSFER-PROMOTION POLICY

Purpose

This policy is a guideline for full-time benefitted employees to lateral transfer-promote into a different benefitted position within the Olivehurst Public Utility District (OPUD).

Definitions

For the purpose of this policy only, a full-time benefitted employee means an OPUD employee, currently working within the District.

Employee "in good standing" means a regular, non-probationary, employee who is not then subject to a disciplinary proceeding or under disciplinary action, including disciplinary probation. However, if an employee is on non-disciplinary probation the non-probationary clause may be waived subject to verification from the employee's current direct supervisor that he/she is on a path towards passing probation and that there are no existing disciplinary issues.

Scope

OPUD and Operating Engineers Union Local No. 3 agree to the following language pertaining to the filling of vacant positions through internal promotions. The following language will be part of OPUD policy applicable to all employee hires, both management and hourly employees and may be incorporated into any Memorandum of Understanding between OPUD and any employee representative upon request.

When the District intends to fill an open position, it will first offer an opportunity to existing, regular employees in good standing to fill the position by providing employees with written notice of the vacancy. Employees who wish to apply must do so within three workdays after the date of the posting.

Policy

The lateral transfer-promotion posting will include the following:

- Three day written notice of the vacancy (via email or hard copy of email posted in a location(s) accessible to all employees). The District will make a reasonable effort to notify employees of the vacancy who are off work due to illness, injury, vacation or for some other reason. At a minimum, the district will place a telephone call to all numbers for the employee known to the district (home, cell) and provide three working days after the date of the call for response.
- Salary range.
- Position description.

Once the written notice is posted the employee may contact the person or persons listed in the notice to obtain a lateral transfer-promotion form. At the end of the three day notification period the following will occur:

- The OPUD Board of Directors may, at any time, choose to open supervisory and management positions to recruitment outside the District. This would not preclude qualified employees from applying for these positions.
- The lateral transfer-promotion form(s) will be reviewed and position will be filled by an existing employee who applies for the position if there is an employee who meets the required qualifications.
- All applicants may also be subject to an interview panel.
- If more than one qualified existing employee applies for the position, the position will be filled by the most qualified employee as determined by the interview panel and examination (where applicable). A written examination (incorporating computer skills where appropriate) may be used to assure appropriate range of knowledge. A score of 70% is considered passing.
- If a written exam is deemed necessary, all qualified applicants will be given the same written exam and the employee with the highest passing score will be offered the position first.
- If none of the applicants pass the written examination, the position will be opened to applicants outside the District, and the same written examination requirements will apply.
- If no outside candidate passes the written examination, then the existing, regular employee with the highest written examination score will be offered the position OR, at the District's discretion, the position opening will be re-advertised to attract more qualified candidates.
- The District may waive some or all of the required qualifications and appoint a candidate with the understanding that the candidate will acquire the qualifications within a specified time period. In such circumstances, the District and the Union agree

to meet and confer regarding the specified time period and the process to obtain the qualifications.

- The time period and expectations to achieve the qualifications will be reduced to writing.
 - "If no existing employee who meets the required qualifications applies for the position, or if the District in its discretion chooses not to fill the position with an employee not meeting the required qualifications as described in the immediately preceding paragraph, the District will fill the position by seeking applications from outside of the organization."
 - "In the event that an existing employee transfers or is promoted, that employee will serve a probationary period of six months. If the employee fails the probationary period, the employee will be reinstated in his/her former position at the salary that the employee was receiving at the time of the appointment, subject to any changes in salary that would have been applicable to the employee if he/she had remained in the prior position. "

Responsibilities

All OPUD employees are responsible for reading, understanding and adhering to this policy.