



**NOTICE AND CALL OF A SPECIAL MEETING OF  
THE ORANGE COUNTY FIRE AUTHORITY  
HUMAN RESOURCES COMMITTEE**

A Special Meeting of the  
Orange County Fire Authority Human Resources Committee  
has been scheduled for September 17, 2019  
at 12:00 Noon

The meeting will be held at:  
Orange County Fire Authority  
Regional Fire Operations & Training Center  
Room AE117  
1 Fire Authority Road  
Irvine, CA

The business to be transacted at the meeting will be  
as shown on the attached Agenda.

Opportunity will be provided for members of the public to address the  
Orange County Fire Authority Human Resources Committee  
regarding any item of business as described on the Agenda.

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Human Resources Committee Chair  
Robert Johnson



# ORANGE COUNTY FIRE AUTHORITY AGENDA

## Human Resources Committee Special Meeting

Tuesday, September 17, 2019

12:00 Noon

### Orange County Fire Authority Regional Fire Operations and Training Center

1 Fire Authority Road

Room AE117

Irvine, California 92602

Rob Johnson, Chair

Vince Rossini, Vice Chair

Ed Sachs   Gene Hernandez   Michele Steggell

Noel Hatch   Dave Shawver

This Agenda contains a brief general description of each item to be considered. Except as otherwise provided by law, no action or discussion shall be taken on any item not appearing on the following Agenda. Unless legally privileged, all supporting documents, including staff reports, and any writings or documents provided to a majority of the Human Resources Committee after the posting of this agenda are available for review at the Orange County Fire Authority Regional Fire Operations & Training Center, 1 Fire Authority Road, Irvine, CA 92602 or you may contact Sherry A.F. Wentz, Clerk of the Authority, at (714) 573-6040 Monday through Thursday, and every other Friday from 8 a.m. to 5 p.m. and available online at <http://www.ocfa.org>

If you wish to speak before the Human Resources Committee, please complete a Speaker Form identifying which item(s) you wish to address. Please return the completed form to the Clerk of the Authority. Speaker Forms are available on the counter noted in the meeting room.



In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, you should contact the Clerk of the Authority at (714) 573-6040. Notification 48 hours prior to the meeting will enable the Authority to make reasonable arrangements to assure accessibility to the meeting.

### CALL TO ORDER

### PLEDGE OF ALLEGIANCE by Director Rossini

### ROLL CALL

### PUBLIC COMMENTS

Any member of the public may address the Committee on items within the Committee's subject matter jurisdiction but which are not listed on this agenda during PUBLIC COMMENTS. However, no action may be taken on matters that are not part of the posted agenda. We request comments made on the agenda be made at the time the item is considered and that comments be limited to three minutes per person. Please address your comments to the Committee as a whole, and do not engage in dialogue with individual Committee Members, Authority staff, or members of the audience.

## **1. PRESENTATIONS**

### **A. Introduction of Newly Appointed Human Resources Director**

Submitted by: Lori Zeller, Deputy Chief/Administration & Support Bureau

Recommended Action:

Welcome Assistant Chief/Human Resources Director Nina Collins.

## **2. MINUTES**

### **A. Minutes from the May 7, 2019, Regular Human Resources Committee Meeting**

Submitted by: Sherry Wentz, Clerk of the Authority

Recommended Action:

Approve as submitted.

## **3. CONSENT CALENDAR**

### **A. Classification and Compensation Recommendations for Service Center Occupational Series**

Submitted by Lori Zeller, Deputy Chief/Administration & Support Bureau

Recommended Action:

Review the proposed agenda item and direct staff to place the item on the agenda for the Executive Committee meeting of September 26, 2019, with the Human Resources Committee's recommendation that the Executive Committee:

1. Approve elimination of the Fire Equipment Technician classification.
2. Approve the establishment of the Supply Services Specialist, Urban Search and Rescue Warehouse and Logistics Specialist, Service Center Technician I and Service Center Technician II classifications, with corresponding salary range.
3. Approve the retitling and adoption of the revised classification specification for Fire Delivery Driver and Senior Fire Equipment Technician to Fleet Assistant and Senior Service Center Technician respectively, with corresponding salary range.
4. Approve the revised classification specifications for Service Center Lead and Service Center Supervisor with corresponding salary range.

## **4. DISCUSSION CALENDAR**

### **A. Organizational Service Level Assessment Human Resources Department**

Submitted by: Lori Zeller, Deputy Chief/Administration & Support Bureau

Recommended Action:

Receive and file the report.

**B. Contract Adjustment Third Party Workers' Compensation Administration**

Submitted by: Lori Zeller, Deputy Chief/Administration & Support Bureau

Recommended Action:

Review the proposed agenda item and direct staff to place the item on the agenda for the Executive Committee meeting of September 26, 2019, with the Human Resources Committee's recommendation that the Executive Committee approve and authorize the Purchasing Manager to increase the Professional Services Agreement with CorVel for Workers' Compensation Third Party Administration for the remaining three years of the contract, at an annual increase of \$71,250 for 2019/20 (partial year) and \$95,000 per year for 2020/21 and 2021/22.

**COMMENTS**

**HUMAN RESOURCES DIRECTOR'S COMMENTS**

**COMMITTEE MEMBER COMMENTS**

**CLOSED SESSION**

**CS1. CONFERENCE WITH LEGAL COUNSEL–ANTICIPATED LITIGATION**

Authority: Government Code Section 54956.9(b) – Significant Exposure to Litigation (32 cases)

**CLOSED SESSION REPORT**

**ADJOURNMENT** – The next regular meeting of the Human Resources Committee will be Tuesday, November 5, 2019, at 12 noon.

**AFFIDAVIT OF POSTING**

I hereby certify under penalty of perjury under the laws of the State of California, that the foregoing Agenda was posted in the lobby, front gate public display case, and website of the Orange County Fire Authority, Regional Fire Training and Operations Center, 1 Fire Authority Road, Irvine, CA, not less than 72 hours prior to the meeting. Dated this 12<sup>th</sup> day of September 2019.

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Sherry A.F. Wentz, CMC  
Clerk of the Authority

**UPCOMING MEETINGS:**

Executive Committee Meeting

Thursday, September 26, 2019, 5:30 p.m.

Board of Directors Meeting

Thursday, September 26, 2019, 6:00 p.m.

**AGENDA ITEM NO. 1A**

There are no supportive materials  
for Presentation Item No. 1A

# **MINUTES ORANGE COUNTY FIRE AUTHORITY**

## **Human Resources Committee Meeting**

**Tuesday, May 7, 2019**

**12:00 Noon**

## **Regional Fire Operations and Training Center**

**Room AE117**

**1 Fire Authority Road**

**Irvine, CA 92602**

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### **CALL TO ORDER**

A meeting of the Human Resources Committee was called to order on May 7, 2019, at 12:00 p.m. by Chair Johnson.

### **PLEDGE OF ALLEGIANCE**

Director Hernandez led the assembly in the Pledge of Allegiance to our Flag.

### **ROLL CALL**

**Present:** Rob Johnson, Cypress  
Vince Rossini, Villa Park  
David Shawver, Stanton  
Gene Hernandez, Yorba Linda  
Noel Hatch, Laguna Woods  
Michele Steggell, La Palma

**Absent:** Ed Sachs, Mission Viejo

### **Also present were:**

Fire Chief Brian Fennessy  
Deputy Chief Dave Anderson  
Assistant Chief Robert Cortez  
Legal Counsel Keith R. Dobyns

Deputy Chief Lori Zeller  
Assistant Chief Randy Black  
Assistant Chief Jim Ruane  
Clerk of the Authority Sherry Wentz

## **PUBLIC COMMENTS (F: 12.02D3)**

Chair Johnson opened the Public Comments portion of the meeting. Chair Johnson closed the Public Comments portion of the meeting without any comments from the public.

### **1. PRESENTATIONS**

No Items.

### **2. MINUTES**

#### **A. Minutes from the Human Resources Committee February 5, 2019, Regular Meeting (F: 12.02D2)**

On motion of Director Shawver and second by Director Hernandez, the Human Resources Committee voted to approve the Minutes of the February 5, 2019, Regular Human Resources Committee meeting as submitted.

Director Steggell was recorded as an abstention due to her absence from the meeting.

### **3. CONSENT CALENDAR**

No Items.

### **4. DISCUSSION CALENDAR**

#### **A. Contract Adjustments Third Party Workers' Compensation Administration (F: 18.10A2)**

Deputy Chief Lori Zeller introduced the Contract Adjustments Third Party Workers' Compensation Administration report and introduced Rhonda Haynes, Risk Management Analyst, who provided an overview of the scope of services.

Director Hatch arrived at this point (12:06 p.m.).

On motion of Vice Chair Rossini and second by Director Shawver, Human Resources Committee voted unanimously to authorize one portion of the Contract Adjustment Third Party Workers' Compensation Administration. The portion of the contract adjustment was authorized to extend the contract with CorVel for insurance legacy claims only, for three years in an amount not to exceed \$30,000 (\$10,000 annually). The committee also directed staff to return for further discussion of the remaining portions of the proposed CorVel contract amendments to the next scheduled Human Resources Committee meeting with staff providing additional information as requested by the Committee.

**B. Human Resources Director – Executive Recruitment (F: 17.10J)**

Deputy Chief Lori Zeller provided an update on Executive Recruitment for Human Resources Director.

By consensus, the Committee received and filed the report.

**C. Garden Grove Transition of Employment Update (F: 10.03 GG)**

Deputy Chief Lori Zeller provided an update on the personnel transition process from the Garden Grove Fire Department to the Orange County Fire Authority.

By consensus, the Committee received and filed the report.

**COMMITTEE MEMBER COMMENTS (F: 12.02D4)**

Chair Johnson welcomed Director Steggell as a newly appointed member to the Human Resources Committee.

Director Hatch thanked Risk Management Analyst Rhonda Haynes for her hard work and initiative regarding the Contract Adjustments Third Party Workers' Compensation Administration report.

**CLOSED SESSION (F: 12.02D5)**

**CS1. CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION**

Authority: Government code section 54956.9(b) – Significant Exposure to Litigation (35 cases)

General Counsel Keith R. Dobyns reported the Human Resources Committee would be convening to Closed Session to consider the matter on Agenda identified as CS1, Conference with Legal Counsel-Anticipated Litigation.

Chair Johnson recessed the meeting to Closed Session at 12:59 p.m.

Chair Johnson reconvened the meeting from Closed Session at 1:19 p.m., with all members present.

**CLOSED SESSION REPORT (F: 12.02D5)**

Legal Counsel Keith R. Dobyns stated there were no reportable actions.



**ADJOURNMENT** – Chair Johnson adjourned the meeting at 1:20 p.m. The next regular meeting of the Human Resources Committee will be Tuesday, August 6, 2019, at 12:00 noon.

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Sherry A.F. Wentz, CMC  
Clerk of the Authority



Orange County Fire Authority  
**AGENDA STAFF REPORT**

**Human Resources Committee Meeting**  
**September 17, 2019**

**Agenda Item No. 3A**  
**Consent Calendar**

**Classification and Compensation Recommendations for**  
**Service Center Occupational Series**

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**Contact(s) for Further Information**

Lori Zeller, Deputy Chief  
Administration & Support Bureau

[lorizeller@ocfa.org](mailto:lorizeller@ocfa.org)

714.573.6020

Tamaryn Boston, Manager  
Human Resources

[tamarynboston@ocfa.org](mailto:tamarynboston@ocfa.org)

714.573.6018

**Summary**

This agenda item is submitted for approval to implement several classification and compensation recommendations resulting from a comprehensive study of the Service Center occupational series. This study was conducted pursuant to the 2018-2020 Memorandum of Understanding (MOU) between the Orange County Fire Authority (OCFA) and the Orange County Employees Association (OCEA).

**Prior Board/Committee Action**

Not Applicable.

**RECOMMENDED ACTION(S)**

Review the proposed agenda item and direct staff to place the item on the agenda for the Executive Committee meeting of September 26, 2019, with the Human Resources Committee's recommendation that the Executive Committee:

1. Approve elimination of the Fire Equipment Technician classification.
2. Approve the establishment of the Supply Services Specialist, Urban Search and Rescue Warehouse and Logistics Specialist, Service Center Technician I and Service Center Technician II classifications, with corresponding salary ranges.
3. Approve the retitling and adoption of the revised classification specification for Fire Delivery Driver and Senior Fire Equipment Technician to Fleet Assistant and Senior Service Center Technician respectively, with corresponding salary range.
4. Approve the revised classification specifications for Service Center Lead and Service Center Supervisor, with corresponding salary range.

**Impact to Cities/County**

Not Applicable.

**Fiscal Impact**

The FY 2019/20 partial-year budget impact will not exceed \$112,183, assuming all vacant positions are filled. The annual impact of this reclassification is \$150,514, which will be incorporated into future budgets.

## **Background**

The Orange County Fire Authority's Service Center Section provides logistical support for the entire organization, providing headquarters and fire stations with everything from office supplies to structural firefighting gear. This Section also performs testing and repairs on a wide variety of firefighting equipment and coordinates the delivery of specialized emergency support on various emergency incidents.

In the 2018-2020 MOU between the OCFA and the OCEA, OCFA agreed to conduct a classification study for the Service Center occupational series within twelve months of the Board's approval of the contract [Article XXII, Section 2(C)].

Classifications are often grouped in an occupational series. The Service Center currently has a five-level occupational series, which begins with entry-level and semi-skilled classifications (Fire Delivery Driver and Fire Equipment Technician) and progresses to skilled (Senior Fire Equipment Technician), lead (Service Center Lead), and finally supervisory (Service Center Supervisor) classifications. Although these classifications are primarily utilized in OCFA's Service Center, Fleet Services, Emergency Medical Services (EMS), and Urban Search and Rescue (US&R) Sections also utilize three of the classifications within the occupational series.

In accordance with the classification study prescribed in the 2018-2020 MOU, Koff & Associates (Koff) was retained to conduct a comprehensive classification and compensation study on the Service Center occupational series. The study commenced in March 2019 and evaluated the essential duties of the occupational series in order to identify the scope and complexity of work, develop a sound classification structure, and recommend an equitable base salary structure that is both internally equitable and externally competitive.

Based on the results of the study, Koff and Human Resources recommend that the Fire Delivery Driver and Fire Equipment Technician classifications be replaced by classifications that more accurately support the essential functions of the work performed; specifically, the new classifications of Fleet Assistant, Supply Services Specialist, US&R Warehouse and Logistics Specialist, and Service Center Technician I/II. The recommendation also includes the retitling and adoption of the Senior Fire Equipment Technician to Senior Service Center Technician, as well as the adoption of revised classification specifications for Service Center Lead and Service Center Supervisor.

These recommendations will retain a five-level occupational series in the Service Center (Service Center Technician I, Service Center Technician II, Senior Service Center Technician, Service Center Lead, and Service Center Supervisor), and create three new standalone classifications (Fleet Assistant, Supply Services Specialist, and US&R Warehouse and Logistics Specialist).

### ***Reclassification Recommendations***

Reclassification recommendations are made for positions that are better aligned with a differing class, due to the level and scope of work, and/or job functions that have been added to or removed from those positions over time. The study resulted in nine positions to be reclassified, as noted in the table below.

CURRENT CLASSIFICATION TITLE	PROPOSED CLASSIFICATION TITLE
Fire Delivery Driver	Senior Service Center Technician
Fire Equipment Technician	Senior Service Center Technician
Fire Delivery Driver	Service Center Technician I
Fire Equipment Technician	Service Center Technician II
Senior Fire Equipment Technician	Service Center Lead
Fire Delivery Driver	Supply Services Specialist
Service Center Lead	Supply Services Specialist
Fire Equipment Technician	US&R Warehouse and Logistics Specialist
Senior Fire Equipment Technician	US&R Warehouse and Logistics Specialist

### ***Title Change Recommendations***

Title changes noted in the table below are recommended to more clearly reflect the level and scope of work being performed, to consolidate work into broader categories that could be used Authority-wide, as well as to establish consistency with the labor market and industry standards.

CURRENT CLASSIFICATION TITLE	PROPOSED CLASSIFICATION TITLE
Fire Delivery Driver	Fleet Assistant
Senior Fire Equipment Technician	Senior Service Center Technician

### ***Salary Range Recommendations***

Upon completion of the classification portion of the study, including the creation of new classifications that accurately reflect the level and scope of work performed, an external market study was performed to determine how OCFA compares with other Southern California public agencies in terms of compensation. Due to the unique nature of the duties performed in the Service Center occupational series, there were an insufficient number of comparable classifications for three of the classifications. As well, of the comparable classifications found, none performed the type of specialized work that OCFA classifications require in addition to the more common warehouse-type of duties.

A benchmark is a job that is found in many organizations and performed by several individuals who have similar duties and require similar qualifications. The Service Center Technician II (currently the Fire Equipment Technician) is the benchmark classification of the Service Center occupational series. The external market study revealed that our current Fire Equipment Technician salary is below market when compared to public agencies in our labor market. Providing for internal equity and external competition, the proposed salary range for the Service Center occupational series is as follows:

CURRENT LEVELS/HOURLY RATE			
Level	Classification	Min Hourly Rate	Max Hourly Rate
1	Fire Delivery Driver	\$15.80	\$21.29
2	Fire Equipment Technician	\$19.62	\$26.44
3	Senior Fire Equipment Technician	\$23.85	\$32.13
4	Service Center Lead	\$31.29	\$42.17
5	Service Center Supervisor	\$35.09	\$47.29

<b>PROPOSED LEVELS/HOURLY RATE</b>			
<b>Level</b>	<b>Classification</b>	<b>Min Hourly Rate</b>	<b>Max Hourly Rate</b>
1	Service Center Technician I	\$19.99	\$26.93
2	Service Center Technician II	\$23.85	\$32.13
3	Senior Service Center Technician	\$26.20	\$35.32
4	Service Center Lead	\$28.90	\$38.95
5	Service Center Supervisor	\$35.09	\$47.29

Providing for internal equity and external competition, the proposed salary range for the three standalone classifications is as follows:

<b>PROPOSED LEVELS/HOURLY RATE</b>			
<b>Level</b>	<b>Classification</b>	<b>Min Hourly Rate</b>	<b>Max Hourly Rate</b>
1	Fleet Assistant	\$15.80	\$21.29
1	Supply Services Specialist	\$19.99	\$26.93
1	US&R Warehouse & Logistics Specialist	\$24.34	\$32.82

The current and proposed classification specifications are attached.

**Attachment(s)**

1. Current Fire Delivery Driver Classification Specification
2. Current Fire Equipment Technician Classification Specification
3. Current Senior Fire Equipment Technician Classification Specification
4. Current Service Center Lead Classification Specification
5. Current Service Center Supervisor Specification
6. Proposed Fleet Assistant Classification Specification
7. Proposed Supply Services Specialist Classification Specification
8. Proposed US&R Warehouse and Logistics Specialist Classification Specification
9. Proposed Service Center Technician I Classification Specification
10. Proposed Service Center Technician II Classification Specification
11. Proposed Senior Service Center Technician Classification Specification
12. Proposed Service Center Lead Classification Specification
13. Proposed Service Center Supervisor Classification Specification



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Fire Delivery Driver**

**REPORTS TO: Service Center Supervisor      FLSA: Non-Exempt**

**SUPERVISES: N/A      CLASS CODE: 0615**

**DEPARTMENT: Business Services**

### **CLASS SUMMARY:**

Incumbents are responsible for performing entry level duties related to driving an OCFA vehicle to deliver and pick up a variety of materials, goods, equipment, and furniture to a variety of locations throughout Orange County.

### **DISTINGUISHING CHARACTERISTICS:**

The Fire Delivery Driver is the first level in a five level Fire Material Services Occupational Group. The Fire Delivery Driver is distinguished from the Fire Equipment Technician, which is responsible for a wide variety of semi-skilled activities. The Fire Delivery Driver is also the first level in a seven level Fire Equipment Maintenance Occupational Group. The Fire Delivery Driver is distinguished from the Assistant Fire Apparatus Technician, which is responsible for semi-skilled duties related to preventative maintenance.

**ESSENTIAL FUNCTIONS:** (These duties are intended to be representative sample of the duties performed by the class.)

Driving van, commercial vehicle, or other vehicle to a variety of destinations including; using loading techniques to pick up and deliver mail, materials, equipment, furniture, and a variety of goods; operating dolly, pallet jack, or other assisted device in an efficient and safe manner; maintaining accurate records; sorting, logging, and storing various items; work independently; operating two-way radio; inspecting vehicle prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil, transmission fluids, lights, etc., and placing orders for repairs; maintaining cleanliness of vehicle and washing vehicle; observing safe driving practices; refueling vehicle; checking weather and/or road conditions as needed, taking appropriate precautions; perform other duties of a similar nature or level.

#### *Positions assigned to Fleet Services:*

Driving fire apparatus to a variety of locations; assisting fire station personnel with switching complements from one apparatus to another; steam cleaning vehicles and apparatus; picking up and delivering parts to vendors.

#### *Positions assigned to Service Center:*

Filling and exchanging oxygen and air bottles; assisting in sizing and outfitting personnel; responding to emergency incidents to provide materials and equipment; staging and removing of furniture/equipment and materials for social events; operating forklift.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fire Delivery Driver

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#### **MINIMUM QUALIFICATIONS:**

##### **EDUCATION AND EXPERIENCE (position requirements at entry):**

High School Diploma or General Equivalency Diploma (GED) and driving experience, or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Warehouse experience desirable (Service Center assignment).

##### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- California Commercial Class B Driver License\*
- Forklift Certification (within three months of hire – for Service Center assignment)

\*Must maintain an acceptable and insurable driving record at all times.

##### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Safe driving practices and applicable California Vehicle Codes;
- Lifting and carrying techniques;
- Delivery practices;
- Care, maintenance, and operation of vehicles;
- Road maps and geographic area of Orange County;
- GPS operations;
- Basic math and computer operation;
- Customer service principles;
- Office procedures and equipment;
- Basic record keeping;
- Applicable tools of trade;
- Warehouse practices (for Service Center assignment)
- Forklift operations (for Service Center assignment)

##### **SKILLS (position requirements at entry):**

Skill in:

- Picking up and delivering items from various locations;
- Driving van, commercial vehicle, or other vehicle in a safe manner;
- Driving fire apparatus (for Automotive assignment)
- Reading and following maps and/or using GPS to determine best routes;
- Loading and unloading a variety of items;
- Exercising discretion and judgment in caring for transported materials;
- Understanding and following oral and written instructions;
- Maintaining accurate records;
- Providing customer service;
- Working in a team environment with ability to work independently;





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fire Delivery Driver

- Entering basic information into a computer, following specific procedures and policies;
- Using dolly, pallet jack, other assisted devices to transport items;
- Using forklift (for Service Center assignment)
- Using a two-way radio;
- Using applicable tools of the trade;
- Washing and maintaining vehicle;
- Performing vehicle safety checks;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc., sufficient to exchange or convey information and to receive work direction.

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#### **PHYSICAL REQUIREMENTS:**

Positions in this class typically require: climbing, balancing, stooping, kneeling, crouching, reaching, standing, walking, driving, pushing, pulling, lifting, fingering, grasping, feeling, talking, hearing, seeing, and repetitive motions.

**Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

#### **WORKING CONDITIONS:**

Incumbents may be subjected to moving mechanical parts, electrical currents, dusts, poor ventilation, chemicals, oils, extreme temperatures, inadequate lighting, workspace restrictions, intense noises, and travel.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Ellen Medalle, Senior Human Resources Analyst, Date: August 2013

Final prepared by OCFA, Date: July 2013

Interim Human Resources Director Review:

Janet Wells \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: August 22, 2013

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fire Equipment Technician

**REPORTS TO:** Service Center Supervisor      **FLSA:** Non-Exempt

**SUPERVISES:** N/A      **CLASS CODE:** 0620

**DEPARTMENT:** Business Services

#### **CLASS SUMMARY:**

Incumbents are responsible for performing a wide variety of entry level duties related to receiving, storing, and issuing a variety of specialized fire and emergency supplies, materials, and equipment.

#### **DISTINGUISHING CHARACTERISTICS:**

The Fire Equipment Technician is the first level in a four level five material services series. The Fire Equipment Technician is distinguished from the Senior Fire Equipment Technician, which is responsible for a wide variety of semi-skilled to skilled activities.

**ESSENTIAL FUNCTIONS:** (These duties are intended to be representative sample of the duties performed by the class.)

Receives, stores, maintains, and issues a variety of specialized fire and emergency supplies, materials, and equipment, which includes: issuing Personnel Protective clothing (PPE); preparing, picking up, and delivering postal, shipping company, and interdepartmental mail and packages; receiving, storing, and distributing cleaning/janitorial and office supplies; washing, repairing, mending, and inspecting PPE gear; filling and exchanging air bottles; sewing or ironing on patches and name tags to clothing; placing decals on helmets; engraving or marking tools with unit numbers; picking up contaminated PPE and delivering loaner PPE to personnel; making and decaling units with County seals, signage, and/or numbers; sizing and outfitting explorers and new academies; laminating items; making keys; and/or other related supplies, materials, and/or equipment.

Operates, tests, and repairs a variety of small electrical and mechanical equipment, hand tools, light shop equipment, and/or other related equipment.

Repairs, replaces, and tests a variety of equipment, which may include: fire hoses, defibrillators, corepacks, axes, pike poles, extrication tools, chainsaws, generators, pumps, trimmers, fans, breathing apparatus, and/or other related equipment.

Fit tests suppression personnel with breathing apparatus masks.

Sets up and takes down tables, chairs, and other items for fire-related social events; supplies and delivers drinks for events and functions.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fire Equipment Technician

Responds to emergency incidents.

Performs other duties of a similar nature or level.

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#### **MINIMUM QUALIFICATIONS:**

##### **EDUCATION AND EXPERIENCE (position requirements at entry):**

High School Diploma, or General Equivalency Diploma (GED), and one year of warehouse experience, or related maintenance and repair work; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

##### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Valid California Driver's License.

##### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Delivery practices;
- Warehousing practices;
- Customer service principles;
- Applicable hand and power tools of the trade.

##### **SKILLS (position requirements at entry):**

Skill in:

- Using applicable hand and power tools;
- Manipulating small objects to make repairs;
- Using marking equipment;
- Recognizing damaged equipment and PPE;
- Picking up and delivery items from site locations;
- Using a radio;
- Providing customer service;
- Adapting to changing needs;
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fire Equipment Technician

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#### **PHYSICAL REQUIREMENTS:**

Positions in this class typically require: climbing, balancing, stooping, kneeling, crouching, reaching, standing, walking, driving, pushing, pulling, lifting, fingering, grasping, feeling, talking, hearing, seeing and repetitive motions.

**Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

#### **WORKING CONDITIONS:**

Incumbents may be subjected to moving mechanical parts, electrical currents, dusts, poor ventilation, chemicals, oils, extreme temperatures, inadequate lighting, workspace restrictions, intense noises, and travel.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Draft prepared by Fox Lawson and Associates LLC (LM), Date: 9/01

Final prepared by OCFA, Date: 03-02

Human Resources Director Review:

Zenovy Jakymiw \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: 03-02

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Senior Fire Equipment Technician**

**REPORTS TO: Service Center Supervisor      FLSA: Non-Exempt**

**SUPERVISES: N/A      CLASS CODE: 0630**

**DEPARTMENT: Business Services**

### **CLASS SUMMARY:**

Incumbents are responsible for performing a wide variety of semi-skilled and skilled activities, including mechanical repair and fabrication for specialized fire equipment. Incumbents also perform a variety of specialized warehousing activities.

### **DISTINGUISHING CHARACTERISTICS:**

The Senior Fire Equipment Technician is the second level in a four level fire material services series. The Senior Fire Equipment Technician is distinguished from the Fire Equipment Technician by its skilled maintenance and warehousing responsibilities. The Senior Fire Equipment Technician is distinguished from the Service Center Lead, which has lead responsibilities.

**ESSENTIAL FUNCTIONS:** (These duties are intended to be representative sample of the duties performed by the class.)

Receives, stores, maintains, and issues a variety of specialized fire and emergency supplies, materials, and equipment, which includes: issuing Personnel Protective clothing (PPE); preparing, picking up, and delivering postal, shipping company, and interdepartmental mail and packages; receiving, storing, and distributing cleaning/janitorial and office supplies; washing, repairing, mending, and inspecting PPE gear; filling and exchanging air bottles; sewing or ironing on patches and name tags to clothing; placing decals on helmets; engraving or marking tools with unit numbers; picking up contaminated PPE and delivering loaner PPE to personnel; making and decaling units with County seals, signage, and/or numbers; sizing and outfitting explorers and new academies; laminating items; making keys; and/or other related supplies, materials, and/or equipment.

Purchases a variety of equipment, materials, and supplies, which may include: name plates, signage, and/or other related items.

Maintains inventory of fire equipment; enters inventory information into a database; sends equipment to external vendors for repair, recharging, refilling, and/or hydrostatic testing; fills air bottles; updates and orders forms for stock items.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Fire Equipment Technician

Operates, tests, and repairs a variety of small electrical and mechanical equipment, hand tools, light shop equipment, ladders, forklifts, and/or other related equipment.

Repairs, replaces, and tests a variety of equipment, which may include: fire hoses, defibrillators, resuscitation regulators, corepacks, axes, pike poles, extrication tools, chainsaws, generators, fire extinguishers, pumps, trimmers, fans, breathing apparatus, and/or other related equipment.

Fabricates a variety of items for equipment, tools, gear, and/or other related items, which may include: bags, chains, straps, buckles, locks, and/or other related items.

Fit tests suppression personnel with breathing apparatus masks, outfits, and/or other related equipment; maintains equipment and personnel files.

Sets up and takes down tables, chairs, and other items for fire-related social events; supplies and delivers drinks for events and functions.

Responds to emergency incidents by providing food, snacks, and drinks; sets up shelter, sleeping, and restroom accommodations at base camps.

Performs other duties of a similar nature or level.

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### **MINIMUM QUALIFICATIONS:**

#### **EDUCATION AND EXPERIENCE (position requirements at entry):**

- High School Diploma, or General Equivalency Diploma (GED), and two years warehouse or inventory control experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

#### **LICENSES AND CERTIFICATIONS:**

- Possession of a valid California Class C Driver License at time of appointment. *This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status.*
- Scott Breathing Apparatus Certification prior to completion of probation.

Some positions may require:

- Possession of a valid California Commercial Class B Driver License. *When the incumbent possesses a California Commercial Class B Driver License, the incumbent is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this*



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Fire Equipment Technician

*classification.*

- *Forklift Certification*

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- County geography;
- Cascade systems and air filling stations;
- Delivery practices;
- Warehousing practices;
- Radio protocols;
- Purchasing principles;
- Metal fabricating equipment;
- Customer service principles;
- Applicable hand and power tools of the trade.

#### **SKILLS (position requirements at entry):**

Skill in:

- Using applicable hand and power tools;
- Manipulating small objects to make repairs;
- Using marking equipment;
- Recognizing damaged equipment and PPE;
- Picking up and delivery items from site locations;
- Using a radio;
- Procuring materials, supplies, and equipment;
- Operating woodworking equipment and tools;
- Fabricating metal items;
- Sewing
- Providing customer service;
- Adapting to changing needs;
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Fire Equipment Technician

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#### **PHYSICAL REQUIREMENTS:**

Positions in this class typically require: climbing, balancing, stooping, kneeling, crouching, reaching, standing, walking, driving, pushing, pulling, lifting, fingering, grasping, feeling, talking, hearing, seeing and repetitive motions.

**Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

#### **WORKING CONDITIONS:**

Incumbents may be subjected to moving mechanical parts, electrical currents, dusts, poor ventilation, chemicals, oils, extreme temperatures, inadequate lighting, workspace restrictions, intense noises, and travel.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Draft prepared by Fox Lawson and Associates LLC (LM), Date: 9/01

Final prepared by OCFA, Date: 03-02

Human Resources Director Review:

Zenovy Jakymiw \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: 03-02

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Service Center Lead**

**REPORTS TO: Service Center Supervisor**

**FLSA: Non-Exempt**

**CLASS CODE: 0650**

**SUPERVISES: N/A**

**DEPARTMENT: Business Services**

### **CLASS SUMMARY:**

Incumbents are responsible for performing lead responsibilities in the Service Center, which includes approving purchase orders, monitoring inventory control, and assigning and monitoring work of staff. Incumbents are responsible for providing input on performance evaluations.

### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Lead is the third level in a four level fire material services series. The Service Center Lead is distinguished from the Senior Fire Equipment Technician by its lead responsibilities. The Service Center Lead is distinguished from the Service Center Supervisor, which has lead supervisory responsibilities.

**ESSENTIAL FUNCTIONS:** (These duties are intended to be representative sample of the duties performed by the class.)

Serves as a lead, which includes: assigning and prioritizing work; monitoring the work of staff; training staff of proper work methods and procedures; providing input on performance evaluations; and, performing other related activities.

Orders a variety of requested items that are or are not contained on blanket purchase orders.

Assists in writing specifications for equipment, materials, and/or supplies.

Monitors delivery runs; creates and maintains daily delivery schedules.

Participates in the budgeting process by monitoring expenditures.

Researches and prepares specifications and purchase requests for personal protective equipment.

Oversees the disposition of fire authority surplus items.

Researches a variety of firefighting and rescue equipment prior to the purchase to ensure quality and availability of products.

Administers the uniform issuance program





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Lead

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Serves as a liaison with Information Systems in coordinating automated inventory control systems and/or other related technological issues.

Performs other duties of a similar nature or level.

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#### **MINIMUM QUALIFICATIONS:**

##### **EDUCATION AND EXPERIENCE (position requirements at entry):**

High School Diploma, or General Equivalency Diploma (GED), and three years of central warehouse and inventory control experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

##### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Valid California Driver's License.
- Forklift Certification required prior to completion of probationary period.

##### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- County geography;
- Delivery practices;
- Warehousing practices;
- Inventory control practices;
- Purchasing principles;
- Customer service principles;
- Applicable hand and power tools of the trade;
- Automated inventory control systems.

##### **SKILLS (position requirements at entry):**

Skill in:

- Prioritizing, assigning, and monitoring work;
- Using applicable hand and power tools;
- Procuring materials, supplies, and equipment;
- Providing customer service;
- Adapting to changing needs;
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials;
- Developing and maintaining delivery schedules;
- Monitoring expenditures;
- Writing specifications;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor,



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Lead

the general public, etc. sufficient to exchange or convey information and to receive work direction.

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#### **PHYSICAL REQUIREMENTS:**

Positions in this class typically require: climbing, balancing, stooping, kneeling, crouching, reaching, standing, walking, driving, pushing, pulling, lifting, fingering, grasping, feeling, talking, hearing, seeing and repetitive motions.

**Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

#### **WORKING CONDITIONS:**

Incumbents may be subjected to moving mechanical parts, electrical currents, dusts, poor ventilation, chemicals, oils, extreme temperatures, inadequate lighting, workspace restrictions, intense noises, and travel.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Draft prepared by Fox Lawson and Associates LLC (LM), Date: 9/01

Final prepared by OCFA, Date: 03-02

Human Resources Director Review:

Zenovy Jakymiw \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: 03-02

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Service Center Supervisor**

**REPORTS TO: Purchasing & Materials Manager**

**FLSA: Non-Exempt**

**SUPERVISES: Varies**

**CLASS CODE: 0660**

**DEPARTMENT: Business Services**

### **CLASS SUMMARY:**

Incumbents are responsible for performing full supervisory responsibilities over the Service Center warehouse, operations, and staff.

### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Supervisor is the fourth level in a four level fire material services series. The Service Center Supervisor is distinguished from the Service Center Lead by its full supervisory responsibilities.

**ESSENTIAL FUNCTIONS:** (These duties are intended to be representative sample of the duties performed by the class.)

Supervises employees, which includes: prioritizing and assigning work; conducting performance evaluations; ensuring staff are trained; and making hiring, termination and disciplinary recommendations.

Plans, coordinates, manages, and supervises the receipt, storage, and delivery of supplies, materials, mail, and equipment into and out of the Service Center warehouse and throughout the Authority; ensures warehousing facilities and their contents are maintained in an orderly, clean, and safe condition.

Plans, coordinates, manages, supervises, and responds on Service Center operated emergency response unit(s).

Assists in establishing procedures for inventory control, warehousing, storeroom, and delivery operations.

Supervises the outfitting of emergency equipment and apparatus.

Plans and coordinates preventive maintenance schedules for Service Center vehicles.

Plans, coordinates, and supervises the delivery of specialized emergency support; ensures appropriate levels of coverage for emergency response units.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

Participates in the budget process, including monitoring and controlling expenditures, submitting budget requests, and/or other related activities.

Manages the activities of contract workers.

Compiles and prepares a variety of inventory and section activity reports.

Plans, coordinates, manages, and supervises the receipt, storage, and distribution of surplus property.

Reviews and participates in the inventory of stock; establishes stock levels.

Conducts studies of warehousing methods and procedures; recommends and implements improvements; coordinates the implementation of new systems, policies, and procedures.

Performs other duties of a similar nature or level.

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### **MINIMUM QUALIFICATIONS:**

#### **EDUCATION AND EXPERIENCE (position requirements at entry):**

High School Diploma, or General Equivalency Diploma (GED), and four years of progressively responsible fire service technician and/or central warehouse and inventory control experience, including one year as a lead; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above. Fire experience is desirable.

#### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Valid California Driver's License.

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Supervisory principles;
- Principles, methods, and practices of large material management warehouse operations;
- Inventory methods;
- Recordkeeping practices;
- Safety procedures and standards;
- Principles and practices of work planning and scheduling;
- Negotiation techniques;
- Report writing methods;



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

- Budget principles;
- Fire service inventory and equipment requirements.

#### **SKILLS (position requirements at entry):**

Skill in:

- Supervising and monitoring employees;
- Prioritizing and assigning work;
- Monitoring and controlling expenditures;
- Writing reports;
- Evaluating workflow;
- Operating warehouse equipment;
- Negotiating contracts;
- Developing and implementing policies and procedures;
- Planning, coordinating, and supervising warehousing operations;
- Developing preventive maintenance schedules;
- Coordinating the implementation of automation systems;
- Performing inventory;
- Establishing stock levels;
- Conducting studies;
- Planning, coordinating, and supervising the receipt, storage, and distribution of surplus property;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.

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#### **PHYSICAL REQUIREMENTS:**

Positions in this class typically require: climbing, balancing, stooping, kneeling, crouching, reaching, standing, walking, driving, pushing, pulling, lifting, fingering, grasping, feeling, talking, hearing, seeing and repetitive motions.

**Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

#### **WORKING CONDITIONS:**

Incumbents may be subjected to moving mechanical parts, electrical currents, dusts, poor ventilation, chemicals, oils, extreme temperatures, inadequate lighting, workspace restrictions, intense noises, and travel.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Service Center Supervisor**

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**NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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**Classification History:**

Draft prepared by Fox Lawson and Associates LLC (LM), Date: 9/01

Final prepared by OCFA, Date: 03-02

Human Resources Director Review:

Zenovy Jakymiw \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: 03-02

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Fleet Assistant**

**REPORTS TO: Fleet Services Supervisor**

**FLSA: Non-Exempt**

**SUPERVISES: N/A**

**CLASS CODE: 0615**

**DEPARTMENT: Logistics**

### **CLASS SUMMARY:**

Under direct supervision, performs a variety of routine tasks related to transporting fire apparatus and vehicles to a variety of locations; maintains cleanliness of work area; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

This is an entry-level, stand-alone classification. Initially under close supervision, incumbents learn and perform routine duties associated with driving fire apparatus and vehicles to different locations. As experience is gained, assignments become more varied; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. This class is distinguished from the Assistant Fire Apparatus Technician in that the latter performs entry-level semi-skilled activities related to preventative maintenance and tire work in the Fleet Division.

Receives direct supervision from assigned supervisory and management staff. Exercises no direct supervision over staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Transports fire apparatus and vehicles to and from Authority fire stations, Authority headquarters, or to and from vendors.
- Inspects vehicles prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil, transmission fluids, lights, etc., and places orders for repairs.
- Maintains Fleet Division premises and vehicle wash areas; empties trash cans.
- Fuels vehicles as needed; ensures pool vehicle area is organized and vehicles are ready to use in case of an emergency situation; assists staff in setting up weekend pool vehicle lineup.
- Steam cleans vehicles and apparatus.
- Assists Fleet Division Fire Apparatus/Parts Specialist with pick up and deliveries as assigned.
- Records fuel levels in fuel station tanks.
- Performs related duties as assigned.





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fleet Assistant

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#### **MINIMUM QUALIFICATIONS:**

##### **EDUCATION AND EXPERIENCE (position requirements at entry):**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

One (1) year of responsible experience in operating a motor vehicle or cargo van or an equivalent combination of training and experience.

##### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of a valid Class B California driver's license with air brakes endorsement at time of appointment. Must have tanker endorsement within six (6) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

##### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- Basic custodial skills.
- Business arithmetic.
- GPS for driving purposes.
- Hand and power tools used in the course of work.
- Lifting and carrying techniques.
- Delivery practices.
- Record keeping principles and procedures.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

##### **SKILLS (position requirements at entry):**

Skill in:





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fleet Assistant

- Driving fire apparatus and vehicles in a safe and effective manner.
- Reading and following maps and/or using GPS to determine best routes.
- Operating a variety of hand and power tools used in the course of work.
- Cleaning and caring for assigned areas and equipment.
- Loading and unloading a variety of items.
- Making accurate arithmetic calculations.
- Basic principles and procedures of record-keeping and reporting.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Learning to independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in and around a standard vehicle repair shop setting; strength, stamina, and mobility to perform light to medium physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from fire apparatus and vehicles, to operate varied hand and power tools and equipment, and to operate fire apparatus and motor vehicles and visit various County sites; and vision to inspect and operate equipment and vehicles. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and tools and equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE).

### **WORKING CONDITIONS:**

Employees primarily work in a centralized maintenance shop and are exposed to loud noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, hazardous physical substances and fumes, dust and air contaminants. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to respond to emergencies during evenings, weekends, and/or holidays.

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Fleet Assistant

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**NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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**Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Supply Services Specialist

**REPORTS TO:** Varies

**FLSA:** Non-Exempt

**SUPERVISES:** N/A

**CLASS CODE:** TBD

**DEPARTMENT:** Varies

#### **CLASS SUMMARY:**

Under general supervision and depending on assignment, orders, receives, stores, and manages the inventory of supplies to various Authority divisions and fire stations including counting, restocking, organizing, and labeling; and performs related duties as assigned.

#### **DISTINGUISHING CHARACTERISTICS:**

This is a fully qualified, journey-level, stand-alone classification. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Service Center Technician class series in that the latter performs repair, service, and maintenance of a variety of firefighting tools, safety equipment, and other related fire department apparatus.

Receives general supervision from assigned supervisory and/or management staff. Exercises no direct supervision over staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Maintains warehouse and distribution standards and procedures.
- When assigned to the EMS Division, manages the inventory of Emergency Medical Supplies at all OCFA fire stations including ordering, stocking, issuing, packaging, shipping, counting, restocking, organizing, and labeling.
- Consults with OCFA staff to determine specific purchasing needs and specifications when necessary.
- Establishes successful vendor relationships; checks prices to ensure procurement at an acceptable cost.
- Writes purchase orders in accordance with OCFA policies.
- Inputs and retrieves inventory information using a computer workstation or mobile device; verifies information on computer-generated documents.
- Maintains computerized inventory management system for OCFA fire station staff; generates reports as required.
- Checks supplies, including substitute items, against specifications to determine appropriateness.
- Ensures security of supplies.
- Sorts and places inventory in storage areas, shelves, or bins as required; receives goods from vendors and checks for proper quality, quantity, condition, and price.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Supply Services Specialist

- Coordinates with Service Center staff on the restocking of supplies pulled from OCFA fire stations and efficient methods of delivering supplies accurately and efficiently in emergency situations.
- When assigned to the EMS Division, educates and informs OCFA fire station staff on use and location of Resident Medical Information (RMI) Cards; explains distribution procedures for the RMI cards and transition of patient information to the RMI form.
- When assigned to the EMS Division, maintains the Emergency Medical Supply Mapping system to process and move expiring supplies to fire stations with higher call volumes.
- When assigned to the EMS Division, educates OCFA fire station staff on ordering of Emergency Medical Supplies for their respective station; performs cost analysis of station purchases and explains cost breakdowns and prices of supplies in an easy to understand format.
- Inspects vehicle prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil transmission fluids, lights, etc. and places orders for repairs; maintains cleanliness of vehicle and washes vehicle.
- Responds to emergency incidents to deliver supplies during the workday, nights, weekends or holidays.
- Performs special projects as assigned.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**

**EDUCATION AND EXPERIENCE (position requirements at entry):** *Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Two (2) years of experience performing inventory work including maintenance of computer-based inventory systems.

### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status.

### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Common medical supplies and equipment and their proper methods of use and storage.
- Methods and procedures involved in the maintenance of accurate inventory records.
- Inventory control methods and techniques.
- Warehousing practices and methods.
- Storekeeping and purchasing terminology.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Supply Services Specialist

- Supply sources and pricing standards.
- Proper methods of receiving and storing a variety of supplies; lifting and carrying techniques.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

Skill in:

- Maintain an accurate inventory and record-keeping system; maintain perpetual inventory records to ensure adequate stock on hand.
- Gather, organize, analyze, and present a variety of data and information.
- Determine priorities based on staff needs and work with short deadlines.
- Drive vehicles in a safe and effective manner.
- Read and follow maps and/or use GPS to determine best routes.
- Load and unload a variety of items.
- Make accurate arithmetic calculations.
- Maintain a variety of filing, record-keeping, and tracking systems.
- Clean and care for assigned areas and equipment.
- Understand and follow oral and written instructions.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Supply Services Specialist

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Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform light to medium physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from ladders to reach shelving, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect supplies and operate equipment. The job involves fieldwork requiring frequent walking in operational areas and driving to various County sites. Finger dexterity is needed to operate equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff.

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, hazardous physical substances and odors, and fumes, dust and air contaminants.

May be required to respond to emergencies during evenings, weekends, and/or holidays. Unscheduled overtime work is required to support various emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: US&R Warehouse and Logistics Specialist**

**REPORTS TO: Fire Battalion Chief**

**FLSA: Non-Exempt**

**SUPERVISES: N/A**

**CLASS CODE: TBD**

**DEPARTMENT: Operations**

### **CLASS SUMMARY:**

Under general supervision, performs logistical functions involving preparing, coordinating, and maintaining the OCFA's Urban Search and Rescue (US&R) Task Force equipment cache in an appropriate state of readiness for immediate deployment; receives, stores, and issues a variety of specialized fire and emergency supplies, materials, and equipment; transports and stocks inventory; operates vehicles and performs minor upkeep; maintains the US&R warehouse; supports local training classes and emergency incidents; may deploy with the US&R Task Force to emergency incidents; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

This is a fully qualified journey-level, stand-alone classification. Positions at this level are distinguished by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Service Center Technician classes in that the latter classes do not travel to disaster sites around the United States with the US&R Task Force nor perform extensive fabrication of equipment for OCFA apparatus.

Receives general supervision from a Fire Battalion Chief (US&R Program Manager). Exercises no direct supervision over staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Maintains US&R Task Force equipment cache in a state of readiness; schedules and/or performs maintenance on equipment as needed including generators, SCBA equipment, oxygen cylinders, and batteries; researches new equipment purchases or recommends the purchases of new items to support, augment or replace aging items in the cache.
- Records and maintains computer and hard copy records for US&R supplies, equipment, and maintenance activities.
- Maintains US&R Task Force member database including contact information, required training certifications, and other information required by Federal Emergency Management Agency (FEMA).
- Researches and prepares specifications and purchase requests for US&R Personal Protective



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: US&R Warehouse and Logistics Specialist

Equipment (PPE) and clothing; outfits new US&R team members with PPE and clothing; cleans, maintains, and organizes US&R clothing stock in specified storage location.

- Receives, inspects, accepts and stores a variety of supplies, materials, and equipment including specialized fire and emergency supplies and equipment; packages goods for shipment and organizes materials for deliveries.
- Issues a variety of materials, tools, and equipment to US&R team members; exchanges damaged, expired, or non-functioning equipment received from US&R team members.
- Performs inventory on US&R Task Force supplies, materials, and equipment as required.
- Maintains security and cleanliness of the US&R warehouse.
- Operates heavy equipment including forklifts, generators, hydraulic lifts, electric pallet jack, and off-road vehicles in an efficient and safe manner.
- Lifts heavy supplies, materials, and equipment; loads and unloads semi-trailers; transports heavy equipment.
- Drives vehicles to and from OCFA fire stations and the US&R warehouse to deliver supplies, materials, equipment, furniture and other items.
- Inspects vehicle prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil transmission fluids, lights, etc. and places orders for repairs; maintains cleanliness of vehicle and washes vehicle.
- Follows FEMA guidelines on the rehabilitation of equipment and tools following usage in training situations and/or emergency calls.
- Provides logistics support to various training drills, education classes, and emergency incidents as needed with equipment and supplies.
- Operates, tests, repairs, and replaces a variety of equipment, hand tools, light shop equipment, and/or other related equipment.
- Responds to emergency incidents to provide supplies, materials, and equipment during the workday, nights, weekends or holidays; may respond with the US&R Task Force to national disaster sites.
- Attends required FEMA training classes and conferences including those located outside of California.
- Assists in coordination and set-up of special events; sets up conference rooms for meetings; moves office furniture and equipment.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**

**EDUCATION AND EXPERIENCE** (position requirements at entry): *Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Two (2) years of experience in procuring, receiving, storing, issuing, stocking, and inventorying





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: US&R Warehouse and Logistics Specialist

supplies and materials in a computerized supply environment and/or related mechanical maintenance and repair work experience.

#### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment. This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status.
- Depending on assignment, possession of, or ability to obtain, a valid California Class A driver's license with Tanker and Hazardous Materials Endorsement within twelve (12) months of appointment. Incumbents with a Class A license are subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.
- Possession of, or ability to obtain a FEMA ICS 100, 200, 700, 800, and Ethics certifications within six (6) months of appointment.
- Possession of, or ability to obtain certification in WMD Enhanced Operations (computer based and instructor lead training), AWR-160 within six (6) months of appointment.
- Possession of, or ability to obtain, a valid Forklift Operator Certification within six (6) months of appointment.
- Possession of, or ability to obtain IATA, CFR 49, AF-MAN 24-204 certification within twelve (12) months of appointment.
- Depending on assignment, possession of, or ability to obtain FEMA Logistics Specialist Training within twelve (12) months of appointment.

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Inventory control methods and techniques.
- Warehousing practices and methods.
- Storekeeping and purchasing terminology.
- Proper methods of receiving and storing a variety of supplies, materials, tools and equipment; lifting and carrying techniques.
- Hand and power tools used in the course of work.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Basic principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: US&R Warehouse and Logistics Specialist

- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

##### Skill in:

- Operating, maintaining, and performing light repair and servicing of a variety of tools, equipment, and safety apparatus used by US&R Task Force members.
- Maintaining an accurate inventory and record-keeping system.
- Maintaining and updating detailed training records.
- Conducting research regarding goods; collecting bids; and recommending purchases.
- Preparing purchase orders and processing invoices; generating related reports.
- Operating a variety of hand and power tools used in the course of work.
- Driving and operating heavy equipment and vehicles in a safe and effective manner.
- Reading and following maps and/or using GPS to determine best routes.
- Loading and unloading a variety of items.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform medium to heavy physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to operate varied hand and power tools and construction equipment, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect and operate equipment. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and repair tools and equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis,



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: US&R Warehouse and Logistics Specialist

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in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE) appropriate for the work and environment for which they are working.

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, vermin, insects, and parasites, biologic and infectious agents, and hazardous physical substances and odors, fumes, dust and air contaminants. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to on-call duty and to work various shifts or emergencies during evenings, weekends, and/or holidays. May respond with the US&R Task Force to national disaster sites.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician I

**REPORTS TO:** Service Center Supervisor      **FLSA:** Non-Exempt

**SUPERVISES:** N/A      **CLASS CODE:** TBD

**DEPARTMENT:** Logistics

#### **CLASS SUMMARY:**

Under immediate supervision, performs a variety of routine and semi-skilled duties to repair, service, and maintain a variety of firefighting tools, safety equipment, and other related fire department apparatus; receives, stores, and issues a variety of specialized fire and emergency supplies, materials, and equipment; and performs related duties as assigned.

#### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Technician I is the first level in a five level Service Center Technician series. This is the entry-level classification in the Service Center Technician series. Initially under close supervision, incumbents learn and perform routine duties in the Service Center including the repair and servicing of tools and equipment and the receipt, storage, and issuance of fire and emergency supplies. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Service Center Technician II level but are not expected to function at the same skill level, and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Positions in the Service Center Technician class series are flexibly staffed; positions at the Service Center Technician II level are normally filled by advancement from the Service Center Technician I level; progression to the Service Center Technician II level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the Service Center Technician II level.

Receives immediate supervision from assigned supervisory and management staff, and/or functional direction and training from a Senior Service Center Technician. Exercises no direct supervision over staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

*Positions at the Service Center Technician I level may perform some of these duties and responsibilities in a learning capacity.*



# **ORANGE COUNTY FIRE AUTHORITY**

## **CLASS SPECIFICATIONS**

### **Job Title: Service Center Technician I**

- Receives, inspects, accepts and stores a variety of supplies, materials, and equipment including specialized fire and emergency supplies and equipment including Personnel Protective Equipment (PPE) and clothing; packages goods for shipment and organizes materials for deliveries.
- Issues a variety of materials, tools, and equipment to OCFA staff; exchanges damaged, expired, or non-functioning equipment received from OCFA staff.
- Perform inventory on supplies, materials, and equipment as required.
- Records and maintains computer and hard copy records for supplies, equipment, and maintenance activities.
- Staffs the Service Center counter and answers questions and fulfills requests; communicates with OCFA staff via e-mail, telephones, and two-way radios.
- Lifts heavy supplies, materials, and equipment; transports heavy equipment.
- Drives vehicles to a variety of destinations to deliver mail, supplies, materials, equipment, furniture and other items.
- Inspects vehicle prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil transmission fluids, lights, etc. and places orders for repairs; maintains cleanliness of vehicle and washes vehicle.
- Operates forklift, dolly, electric pallet jack or other assisted devices in an efficient and safe manner.
- Inspects, repairs, mends, and launders PPE gear; picks up contaminated PPE and delivers loaner PPE to OCFA staff; sews and irons on patches and name tags to clothing; places decals on helmets; sizes and outfits fire academy explorer and academy groups.
- Engraves or marks tools with unit numbers; assists Senior Fire Equipment Technicians with making applying, and/or removing OCFA decals, seals, signage, and/or numbers on/from apparatus; laminates items.
- Performs routine inspections, maintenance, and repairs on all self-contained breathing apparatus (SCBA) and bottles, resuscitators, oxygen cylinders and NI-Cad batteries; operates a mobile breathing air compressor to refill breathing apparatus bottles at the Service Center or out in the field during emergencies; monitors and calibrates refill stations to mandated levels; manages testing programs for all SCBA systems and oxygen cylinders to meet department standards and State and Federal regulations; coordinates the testing of breathing apparatus bottles with SCBA vendor; inspects bottles upon return from testing and creates labels identifying date of required retesting; fit tests fire suppression personnel with breathing apparatus masks.
- Operates, tests, repairs, and replaces a variety of equipment, hand tools, light shop equipment, and/or other related equipment.
- Responds to emergency incidents to provide supplies, materials, and equipment during the workday, nights, weekends or holidays.
- Assists in coordination and set-up of special events; set-up conference rooms for meetings; moves office furniture and equipment.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician I

**EDUCATION AND EXPERIENCE (position requirements at entry):** *Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

One (1) year of experience receiving, storing, issuing, stocking, and inventorying supplies and materials in a computerized supply environment and/or related mechanical maintenance and repair work experience.

**LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.
- Possession of, or ability to obtain, a valid California driver's Class B license within six (6) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent with a Class B license is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

**KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Working knowledge of inventory control methods and techniques.
- Working knowledge of warehousing practices and methods.
- Working knowledge of storekeeping and purchasing terminology.
- Learn the principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of fire apparatus and self-contained breathing apparatus (SCBA).
- Learn the proper methods of receiving and storing a variety of supplies, materials, tools and equipment; lifting and carrying techniques.
- Hand and power tools used in the course of work.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Basic principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician I

task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

Skill in:

- Repairing and servicing a variety of tools, equipment, and safety apparatus used by OCFA staff including self-contained breathing apparatus (SCBA).
- Maintaining an accurate inventory and record-keeping system.
- Operating a variety of hand and power tools used in the course of work.
- Driving vehicles in a safe and effective manner.
- Reading and following maps and/or use GPS to determine best routes.
- Loading and unloading a variety of items.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform medium to heavy physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from fire apparatus and vehicles, to operate varied hand and power tools and construction equipment, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect and operate equipment. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and repair tools and equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE).



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician I

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, vermin, insects, and parasites, biologic and infectious agents, hazardous physical substances and odors, fumes, dust and air contaminants, and work at heights using stationary and mobile ladders. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to on-call duty and to work various shifts or emergencies during evenings, weekends, and/or holidays. Unscheduled overtime work is required to support various emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician II

**REPORTS TO:** Service Center Supervisor      **FLSA:** Non-Exempt

**SUPERVISES:** N/A      **CLASS CODE:** 0620

**DEPARTMENT:** Logistics

#### **CLASS SUMMARY:**

Under general supervision, performs a variety of routine and semi-skilled duties to repair, service, and maintain a variety of firefighting tools, safety equipment, and other related fire department apparatus; receives, stores, and issues a variety of specialized fire and emergency supplies, materials, and equipment; and performs related duties as assigned.

#### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Technician II is the second level in a five level Service Center Technician series. This is the fully qualified journey-level classification in the Service Center Technician series. Positions at this level are distinguished from the Service Center Technician I level by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Senior Service Center Technician in that the latter performs the more complex work assigned to the series and provides technical and functional direction over lower level staff.

Positions in the Service Center Technician class series are flexibly staffed; positions at the Service Center Technician II level are normally filled by advancement from the Service Center Technician I level; progression to the Service Center Technician II level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the Service Center Technician II level.

Receives general supervision from assigned supervisory and management staff, and/or functional direction and training from a Senior Service Center Technician. Exercises no direct supervision over staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Receives, inspects, accepts and stores a variety of supplies, materials, and equipment including specialized fire and emergency supplies and equipment including Personnel Protective Equipment (PPE) and clothing; packages goods for shipment and organizes materials for deliveries.
- Issues a variety of materials, tools, and equipment to OCFA staff; exchanges damaged, expired, or



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician II

- non-functioning equipment received from OCFA staff.
- Perform inventory on supplies, materials, and equipment as required.
- Records and maintains computer and hard copy records for supplies, equipment, and maintenance activities.
- Staffs the Service Center counter and answers questions and fulfills requests; communicates with OCFA staff via e-mail, telephones, and two-way radios.
- Lifts heavy supplies, materials, and equipment; transports heavy equipment.
- Drives vehicles to a variety of destinations to deliver mail, supplies, materials, equipment, furniture and other items.
- Inspects vehicle prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil transmission fluids, lights, etc. and places orders for repairs; maintains cleanliness of vehicle and washes vehicle.
- Operates forklift, dolly, electric pallet jack or other assisted devices in an efficient and safe manner.
- Inspects, repairs, mends, and launders PPE gear; picks up contaminated PPE and delivers loaner PPE to OCFA staff; sews and irons on patches and name tags to clothing; places decals on helmets; sizes and outfits fire academy explorer and academy groups.
- Engraves or marks tools with unit numbers; assists Senior Fire Equipment Technicians with making applying, and/or removing OCFA decals, seals, signage, and/or numbers on/from apparatus; laminates items.
- Performs routine inspections, maintenance, and repairs on all self-contained breathing apparatus (SCBA) and bottles, resuscitators, oxygen cylinders and NI-Cad batteries; operates a mobile breathing air compressor to refill breathing apparatus bottles at the Service Center or out in the field during emergencies; monitors and calibrates refill stations to mandated levels; manages testing programs for all SCBA systems and oxygen cylinders to meet department standards and State and Federal regulations; coordinates the testing of breathing apparatus bottles with SCBA vendor; inspects bottles upon return from testing and creates labels identifying date of required retesting; fit tests fire suppression personnel with breathing apparatus masks.
- Operates, tests, repairs, and replaces a variety of equipment, hand tools, light shop equipment, and/or other related equipment.
- Responds to emergency incidents to provide supplies, materials, and equipment during the workday, nights, weekends or holidays.
- Assists in coordination and set-up of special events; set-up conference rooms for meetings; moves office furniture and equipment.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**

**EDUCATION AND EXPERIENCE** (position requirements at entry): *Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Two (2) years of experience performing duties similar to that of a Service Center Technician II with the



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician II

OCFA or other fire agency.

#### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.
- Possession of, or ability to obtain, a valid California driver's Class B license within six (6) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent with a Class B license is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Working knowledge of inventory control methods and techniques.
- Working knowledge of warehousing practices and methods.
- Working knowledge of storekeeping and purchasing terminology.
- Learn the principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of fire apparatus and self-contained breathing apparatus (SCBA).
- Learn the proper methods of receiving and storing a variety of supplies, materials, tools and equipment; lifting and carrying techniques.
- Hand and power tools used in the course of work.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Basic principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

Skill in:

- Repairing and servicing a variety of tools, equipment, and safety apparatus used by OCFA staff



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician II

including self-contained breathing apparatus (SCBA).

- Maintaining an accurate inventory and record-keeping system.
- Operating a variety of hand and power tools used in the course of work.
- Driving vehicles in a safe and effective manner.
- Reading and following maps and/or use GPS to determine best routes.
- Loading and unloading a variety of items.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform medium to heavy physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from fire apparatus and vehicles, to operate varied hand and power tools and construction equipment, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect and operate equipment. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and repair tools and equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE).

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, vermin, insects, and parasites, biologic and infectious agents, hazardous physical substances and odors, fumes, dust and air

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Technician II

contaminants, and work at heights using stationary and mobile ladders. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to on-call duty and to work various shifts or emergencies during evenings, weekends, and/or holidays. Unscheduled overtime work is required to support various emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Senior Service Center Technician**

**REPORTS TO: Service Center Supervisor      FLSA: Non-Exempt**

**SUPERVISES: N/A      CLASS CODE: 0630**

**DEPARTMENT: Logistics**

### **CLASS SUMMARY:**

Under general supervision, performs a wide variety of semi-skilled and skilled activities, including mechanical repair and fabrication for specialized fire equipment; performs a variety of specialized warehousing activities; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

The Senior Service Center Technician is the third level in a five level Service Center Technician series. This is the advanced-level classification in the Service Center Technician series responsible for performing the most complex work assigned to the series. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgment to perform assigned duties/ensure efficient and effective servicing function of the assigned program area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines and methods to deliver services and complete assignments. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. This class is distinguished from the Service Center Lead in that the latter is responsible for performing advanced level work associated with this class series as well as providing training and lead direction over the work of the Service Center staff.

Receives general supervision from the Service Center Supervisor. Exercises technical and functional direction over and provides training to less experienced staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Oversees specific sections within the Service Center; SCBA Room, PPE/Sign Room, Small Engine Repair Room, Fire Equipment Section, and Fire Apparatus Outfitting Section. Utilizes inventory management skills, budgeting skills, purchasing skills, and time management skills in each of these sections.
- Purchases a variety of equipment, materials, and supplies; establishes and maintains assigned purchase orders, blanket order contracts, special procurement needs, and one-time purchases.
- Measures, cuts, drills and modifies various OCFA apparatus to custom fit; modifies aluminum and galvanized steel products; outfits new and rotating apparatus; fabricates, constructs, and outfits new apparatus with bracketry and mounts for equipment stored on each apparatus including hoses and ladders.
- Engraves or marks tools with unit numbers; designs, makes, applies, and/or removes OCFA decals, seals, signage, and/or numbers on/from apparatus; laminates items.



# **ORANGE COUNTY FIRE AUTHORITY**

## **CLASS SPECIFICATIONS**

### **Job Title: Senior Service Center Technician**

- Performs routine inspections, maintenance, and repairs on all self-contained breathing apparatus (SCBA) and bottles, resuscitators, oxygen cylinders and NI-Cad batteries; operates a mobile breathing air compressor to refill breathing apparatus bottles at the Service Center or out in the field during emergencies; monitors and calibrates refill stations to mandated levels; manages testing programs for all SCBA systems and oxygen cylinders to meet department standards and State and Federal regulations; coordinates the testing of breathing apparatus bottles with SCBA vendor; inspects bottles upon return from testing and creates labels identifying date of required retesting; fit tests fire suppression personnel with breathing apparatus masks.
- Receives, inspects, accepts and stores a variety of supplies, materials, and equipment including specialized fire and emergency supplies and equipment including Personnel Protective Equipment (PPE) and clothing; coordinates, prepares, and schedules goods for shipment and organizes materials for deliveries.
- Issues a variety of materials, tools, and equipment to OCFA staff; exchanges damaged, expired, or non-functioning equipment received from OCFA staff.
- Maintains inventory of fire equipment; enters inventory information into a computerized database; performs inventory on supplies, materials, and equipment as required.
- Records and maintains computer and hard copy records for supplies, equipment, and maintenance activities.
- Provides training to lower level employees on Service Center operations including equipment use and repair and established work practices, and policies and procedures.
- Operates, tests, repairs, and replaces a variety of equipment, hand tools, small engines, light shop equipment, and/or other related equipment.
- Staffs the Service Center counter and answers questions and fulfills requests; communicates with OCFA staff via e-mail, telephones, and two-way radios.
- Lifts heavy supplies, materials, and equipment; transports heavy equipment.
- Drives vehicles to a variety of destinations to deliver mail, supplies, materials, equipment, furniture and other items.
- Inspects vehicles prior to usage including checking for fuel, tire tread, windshield, mirrors, brakes, oil transmission fluids, lights, etc. and places orders for repairs; maintains cleanliness of vehicle and washes vehicle.
- Operates forklift, dolly, electric pallet jack or other assisted devices in an efficient and safe manner.
- Inspects, repairs, mends, and launders PPE gear; picks up contaminated PPE and delivers loaner PPE to OCFA staff; sews and irons on patches and name tags to clothing; places decals on helmets; sizes and outfits fire academy explorer and academy groups.
- Responds to emergency incidents to provide supplies, materials, and equipment during the workday, nights, weekends or holidays.
- Assists in coordination and set-up of special events; sets up conference rooms for meetings; moves office furniture and equipment.
- May be assigned to assist with procurement of new apparatus purchases; assists with writing specifications and bidding process; attends pre-construction meetings with selected vendor; travels to vendor's factory to inspect and evaluate the progress of the build and final inspections.
- May be assigned to participate on select OCFA committees.
- May assist the Service Center Supervisor with the recruitment process for Service Center hires or promotions including interviewing candidates, reviewing employment applications, and





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Service Center Technician

recommending candidates for hire or promotion.

- Performs related duties as assigned.

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#### **MINIMUM QUALIFICATIONS:**

##### **EDUCATION AND EXPERIENCE (position requirements at entry):**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Three (3) years of experience performing the full range of duties similar to that of a Service Center Technician II with the OCFA or other fire agency.

##### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.
- Possession of, or ability to obtain, a valid California driver's Class B license within six (6) months of appointment.
- Possession of, or ability to obtain, a valid Forklift Operator Certification at time of appointment or within three (3) months of appointment.
- Possession of, or ability to obtain, a valid Scott Air Supplied Technician certification or equivalent certification(s) issued by Scott at time of appointment or within twelve (12) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent with a Class B license is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

##### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Principles of providing functional direction and training.
- Principles and practices of purchasing.
- Metal fabricating equipment.
- Inventory control methods and techniques.
- Warehousing practices and methods.
- Storekeeping and purchasing terminology.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of fire apparatus and SCBA.
- Proper methods of receiving and storing a variety of supplies, materials, tools and equipment; lifting and carrying techniques.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Service Center Technician

- Hand and power tools used in the course of work.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Basic principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

##### Skill in:

- Planning, organizing, and coordinating the work of assigned staff.
- Effectively providing staff leadership and work direction.
- Procuring materials, supplies, and equipment.
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials.
- Fabricating metal items.
- Repairing and servicing a variety of tools, equipment, and safety apparatus used by OCFA staff including SCBA.
- Maintaining an accurate inventory and record-keeping system.
- Operating a variety of hand and power tools used in the course of work.
- Driving vehicles in a safe and effective manner.
- Reading and following maps and/or using GPS to determine best routes.
- Loading and unloading a variety of items.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Senior Service Center Technician

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform medium to heavy physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from fire apparatus and vehicles, to operate varied hand and power tools and construction equipment, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect and operate equipment. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and repair tools and equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE).

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, vermin, insects, and parasites, biologic and infectious agents, hazardous physical substances and odors, fumes, dust and air contaminants, and work at heights using stationary and mobile ladders. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to on-call duty and to work various shifts or emergencies during evenings, weekends, and/or holidays. Unscheduled overtime work is required to support various emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Service Center Lead**

**REPORTS TO: Service Center Supervisor      FLSA: Non-Exempt**

**SUPERVISES: N/A      CLASS CODE: 0650**

**DEPARTMENT: Logistics**

### **CLASS SUMMARY:**

Under general direction, assigns and monitors the work of lower level staff responsible for the storing and delivery of supplies, materials and equipment located in the Service Center; approves purchase orders, and monitors inventory control of the Service Center storeroom; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Lead is the fourth level in a five level Service Center Technician series. This is a single position, advanced journey-level classification in the Service Center Technician series. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Service Center Supervisor class in that the latter performs the full range of supervisory duties of employees engaged in the repair, service, and maintenance of a variety of firefighting tools, safety equipment, and other related fire department apparatus along with Service Center storeroom responsibilities.

Receives general direction from the Service Center Supervisor and/or management staff. Exercises technical and functional direction over and provides training to less experienced staff. Supervises Service Center staff in absence of the Service Center Supervisor.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Assigns and prioritizes work of Service Center storeroom employees; trains employees in proper work methods and procedures including fabrication, decaling, and assigned to work as Scott Supplied Air Technicians; provides input on employee performance evaluations.
- Orders, stocks, issues, packages, and ships medical supplies; determines blanket order limits; researches for best priced products for inventory; identifies surplus equipment to sell at auction to generate revenue.
- Orders a variety of requested items not contained on blanket purchase orders such as kitchen supplies and other Service Center office supplies.
- Assists in writing specifications for equipment, materials, and/or supplies.
- Monitors Service Center delivery operations to various OCFA sites; creates and maintains daily delivery schedules; delivers supplies as needed.
- Participates in the budgeting process by monitoring expenditures.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Lead

- Researches and prepares specifications and purchase requests for personal protective equipment.
- Operates forklift, dolly, electric pallet jack or other assisted devices in an efficient and safe manner.
- Oversees the disposition of fire authority surplus items.
- Researches a variety of firefighting and rescue equipment prior to purchase to ensure quality and availability of products.
- Performs the duties of the Service Center Supervisor in his/her absence.
- Serves as a liaison with Information Systems staff in coordinating automated inventory control systems and/or related technology issues.
- Meet with vendors and attend various meetings in the absence of the Service Center Supervisor.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**

#### **EDUCATION AND EXPERIENCE (position requirements at entry):**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Three (3) years of experience performing central warehouse and inventory control work including maintenance of computer-based inventory systems.

#### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.
- Possession of, or ability to obtain, a valid Class B California driver's license within six (6) months of appointment.
- Possession of, or ability to obtain, a valid Forklift Operator Certification at time of appointment or within three (3) months of appointment.
- Possession of, or ability to obtain, a valid Scott Air Supplied Technician certification or equivalent certification(s) issued by Scott at time of appointment or within twelve (12) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent with a Class B license is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Principles of providing functional direction and training.
- Common medical supplies and equipment and their proper methods of use and storage.





# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Lead

- Methods and procedures involved in the maintenance of accurate inventory records.
- Automated inventory control methods and techniques.
- Warehousing practices and methods.
- Storekeeping and purchasing terminology.
- Proper methods of receiving and storing a variety of supplies.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- Care, maintenance, and operation of vehicles.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

#### **SKILLS (position requirements at entry):**

##### Skill in:

- Planning, organizing, and coordinating the work of assigned staff.
- Effectively providing staff leadership and work direction.
- Procuring materials, supplies, and equipment.
- Maintaining an accurate inventory and record-keeping system; maintaining perpetual inventory records to ensure adequate stock on hand.
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials.
- Developing and maintaining delivery schedules.
- Monitoring expenditures.
- Writing specifications.
- Driving vehicles in a safe and effective manner.
- Operating medium to heavy equipment during the course of work.
- Reading and following maps and/or using GPS to determine best routes.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Lead

- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment; strength, stamina, and mobility to perform light to medium physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from ladders to reach shelving, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect supplies and operate equipment. The job involves fieldwork requiring frequent walking in operational areas sites. Finger dexterity is needed to operate equipment. Employees must possess the ability to lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff.

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, biologic or infectious agents, hazardous physical substances and odors, and fumes, dust and air contaminants. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be required to respond to emergencies during evenings, weekends, and/or holidays. Unscheduled overtime work is required to support various emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

**Job Title: Service Center Supervisor**

**REPORTS TO: Assistant Fire Chief**

**FLSA: Non-Exempt**

**SUPERVISES: Service Center Staff**

**CLASS CODE: 0660**

**DEPARTMENT: Logistics**

### **CLASS SUMMARY:**

Under general direction, supervises and assists in directing the purchasing, receiving, warehousing, issuing, and recording of materials, supplies and equipment for OCFA; supervises and assists in the mechanical repair and fabrication for specialized fire equipment; provides technical level support to the Assistant Fire Chief; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

The Service Center Supervisor is the fifth level in a five level Service Center Technician series. This is the full supervisory-level classification in the Service Center that exercises independent judgment on diverse and specialized tasks in the operations of the Service Center with accountability and ongoing decision-making responsibilities associated with the work. Incumbents are responsible for planning, organizing, supervising, reviewing, and evaluating the work of assigned staff, for Service Center warehouse operations, and for providing technical level support to the Assistant Fire Chief in a variety of areas. Performance of the work requires the use of independence, initiative, and discretion within established guidelines.

Receives general direction from the Assistant Fire Chief. Exercises direct supervision over technical, maintenance, and administrative support staff.

**ESSENTIAL FUNCTIONS:** *Management reserves the right to add, modify, change, or rescind the work assignments of different positions, and to make reasonable accommodations so that qualified employees can perform the essential functions of the job*

- Plans, organizes, assigns, supervises, and reviews the work of staff assigned to the Service Center; trains staff in work procedures; evaluates employee performance, counsels employees, and effectively recommends initial disciplinary actions; assists in selection and promotion; prepares staff schedules for on-call crews.
- Participates in the development of goals, objectives, policies and procedures for assigned services and programs; recommends and implements policies and procedures including standard operating procedures for assigned operations.
- Monitors activities of the Service Center unit; identifies opportunities for improving service delivery and procedures; provides recommendations concerning process changes; reviews with appropriate management staff; implements improvements.
- Interprets applicable regulatory standards, statutes, and regulations, ensures OCFA compliance, and monitors progress in meeting applicable standards.
- Oversees the OCFA uniform issuance program; monitors issuance frequencies and quantities;



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

inspects uniforms upon receipt; works with vendor on ordering errors or shipping issues; monitors expenditures on blanket purchase orders.

- Plans, coordinates, manages, and supervises the receipt, storage, and delivery of supplies, materials, mail, and equipment into and out of the Service Center warehouse and throughout OCFA; ensures warehousing facilities and their contents are maintained in an orderly, clean, and safe condition; assists staff at the Service Center counter and answers questions and fulfills requests; communicates with OCFA staff via e-mail, telephones, and two-way radios.
- Establishes procedures for inventory control, warehousing, storeroom, and delivery operations; reviews and participates in the inventory of stock; establishes stock levels.
- Plans, coordinates, manages, supervises, and responds on Service Center operated emergency response unit(s) including delivery of specialized emergency support materials and supplies.
- Supervises the outfitting of emergency equipment and apparatus.
- Determines and recommends equipment, materials, and staffing needs for assigned operations, projects, and programs; participates in the annual budget preparation; assists executive staff with forecasting of additional funds needed for staffing, contractors, equipment, materials, and supplies; monitors and approves expenditures; implements adjustments as necessary to meet changing conditions.
- Coordinates the logistical support needed to support the career and reserve firefighter, and engineer academies with equipment and uniform ordering, orientation, and training.
- Coordinates the outfitting and decaling of new apparatus throughout all OCFA divisions.
- Plans, coordinates, manages, and supervises the receipt, storage, and distribution of surplus property.
- Assists with inspecting and laundering PPE (Personal Protective Equipment) and clothing.
- Maintains a variety of records, logs, and reports; updates written manuals and instructions; ensures the timely completion of preventive and predictive maintenance programs.
- Attends meetings with other departments and OCFA staff, vendors, customers, and outside agency personnel; coordinates assigned services and activities with those of other divisions and outside agencies.
- Responds to after-hours emergencies and assists other staff as needed in emergency or relief situations.
- Performs on-call, stand by duty on a regular basis.
- Performs related duties as assigned.

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### **MINIMUM QUALIFICATIONS:**

#### **EDUCATION AND EXPERIENCE (position requirements at entry):**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade.

Five (5) years of progressively responsible experience performing the full range of duties similar to that of a Senior Service Center Technician with the OCFA or other fire agency and/or public agency central



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

warehouse and inventory control experience including at least one year of supervisory experience.

#### **LICENSES AND CERTIFICATIONS (position requirements at entry):**

- Possession of, or ability to obtain, a valid Class C California driver's license by time of appointment.
- Possession of, or ability to obtain, a valid California driver's Class B license within six (6) months of appointment.
- Possession of, or ability to obtain, a valid Forklift Operator Certification within three (3) months of appointment.

This classification is subject to enrollment in the California DMV Pull Notice Program, which periodically provides Risk Management with the incumbent's Driver License record and status. Additionally, the incumbent with a Class B license is subject to the provisions of the Department of Transportation (DOT) regulations, which includes DOT pre-employment drug testing and random drug and alcohol testing while employed in this classification.

#### **KNOWLEDGE (position requirements at entry):**

Knowledge of:

- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.
- Principles and practices of purchasing.
- Inventory control methods and techniques.
- Warehousing practices and methods.
- Storekeeping and purchasing terminology.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of fire apparatus and self-contained breathing apparatus (SCBA).
- Proper methods of receiving and storing a variety of supplies, materials, tools and equipment; lifting and carrying techniques.
- Metal fabricating equipment.
- Hand and power tools used in the course of work.
- Orange County geography and street layout.
- Safe driving practices and techniques; applicable California Vehicle Codes.
- GPS for driving purposes.
- Delivery practices.
- Business arithmetic.
- Principles and procedures of record-keeping and reporting.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and OCFA staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

#### **SKILLS (position requirements at entry):**

Skill in:

- Selecting and supervising staff, providing training and development opportunities, ensuring work is performed effectively, and evaluating performance in an objective and positive manner.
- Assisting in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Effectively providing staff leadership and work direction.
- Procuring materials, supplies, and equipment.
- Receiving, storing, maintaining, and issuing a variety of equipment, supplies, and materials.
- Repairing and servicing a variety of tools, equipment, and safety apparatus used by OCFA staff including self-contained breathing apparatus (SCBA).
- Maintaining an accurate inventory and record-keeping system.
- Operating a variety of hand and power tools used in the course of work.
- Driving vehicles in a safe and effective manner.
- Reading and following maps and/or using GPS to determine best routes.
- Loading and unloading a variety of items.
- Fabricating metal items.
- Making accurate arithmetic calculations.
- Maintaining a variety of filing, record-keeping, and tracking systems.
- Cleaning and caring for assigned areas and equipment.
- Understanding and following oral and written instructions.
- Understanding, interpreting, and applying all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organizing work, setting priorities, meeting critical deadlines, and following-up on assignments.
- Using tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively using computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicating clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establishing, maintaining, and fostering positive and effective working relationships with those contacted in the course of work.

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#### **PHYSICAL REQUIREMENTS:**

Must possess mobility to work in a warehouse environment and in the field; strength, stamina, and mobility to perform medium to heavy physical work; to sit, stand, and walk on level, uneven, or slippery surfaces; frequently reach, twist, turn, kneel, bend, stoop, squat, crouch, grasp and make repetitive hand movement in the performance of daily duties; to climb and descend from fire apparatus and vehicles, to operate varied hand and power tools and construction equipment, and to operate a motor vehicle and visit various County sites; vision including color vision to inspect and operate equipment. The job involves fieldwork requiring frequent walking in operational areas. Finger dexterity is needed to operate and repair tools and equipment. Employees must possess the ability to



# ORANGE COUNTY FIRE AUTHORITY

## CLASS SPECIFICATIONS

### Job Title: Service Center Supervisor

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lift, carry, push, and pull materials and objects averaging a weight of 50 pounds or heavier weights with the appropriate equipment on a frequent/occasional basis, in all cases with the use of proper equipment and/or assistance from other staff. Employees must wear and use the proper Personal Protective Equipment (PPE).

#### **WORKING CONDITIONS:**

Employees work in OCFA buildings, facilities, and in the field and are exposed to loud and excessive noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, vermin, insects, and parasites, biologic and infectious agents, hazardous physical substances and odors, fumes, dust and air contaminants, and work at heights using stationary and mobile ladders. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

May be assigned to on-call duty and required to work various shifts or emergencies during evenings, weekends, and/or holidays.

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#### **NOTE:**

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the needs of the department.

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#### **Classification History:**

Prepared by Koff and Associates; Date: July 2019

Final prepared by OCFA; Date: August 2019

Interim Human Resources Director Review:

Lori Zeller \_\_\_\_\_ Date: \_\_\_\_\_

Adopted by Board of Directors: PENDING / Tentative September 26, 2019

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**Orange County Fire Authority**  
**AGENDA STAFF REPORT**

**Human Resources Committee Meeting**  
**September 17, 2019**

**Agenda Item No. 4A**  
**Discussion Calendar**

**Organizational Service Level Assessment**  
**Human Resources Department**

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**Contact(s) for Further Information**

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**Summary**

This agenda item is submitted to receive and file the final report from Citygate Associates, for the Service Level Assessment (SLA) it completed of the OCFA's Human Resources Department (HR).

**Prior Board/Committee Action**

At its meeting of November 15, 2018, the Executive Committee awarded a Master Consulting Agreement with Citygate Associates, LLC, the number one ranked firm in the OCFA's request for qualifications process for as-needed organizational service level review consulting services. Upon approval of the Master Agreement, staff was directed to return to the full Board of Directors in January with details regarding the initial year's scope of work, cost, and budget.

At its meeting of January 24, 2019, the Board of Directors approved and authorized the Purchasing Manager to issue individual Purchase Orders to Citygate Associates for five separate SLAs, one of which covered the OCFA's Human Resources Department.

**RECOMMENDED ACTION(S)**

Receive and file the report.

**Impact to Cities/County**

Not Applicable.

**Fiscal Impact**

Not Applicable.

**Background**

Staff began working with Citygate on the HR SLA in March 2019 by responding to its document request and assembling the information it needed to begin its review. On-site interviews were then conducted by Citygate with multiple managers and employees from Human Resources, along with individual meetings with each of the four OCFA labor associations. Following completion of its research, interviews, and discussions, Citygate prepared a mid-project review report. The mid-project review document was reviewed with the Fire Chief and Deputy Chief for fact-checking prior to completion, and additional information was exchanged.

Attached is the final HR SLA report submitted by Citygate in which it has identified three important positioning objectives for OCFA's HR Department for the future:

- Becoming an organizational strategic partner
- Improving organizational support
- Achieving recognition as an employer of choice

Staff believes that this document provides OCFA with a useful road-map for improving HR services that we provide to our most important resource...our people. The timing for receipt of this report is excellent, as OCFA's new Assistant Chief/Director of Human Resources will be starting with the OCFA on September 16, 2019.

The Citygate representatives who performed the SLA will be present at the Human Resources Committee meeting on September 17, 2019, to discuss this SLA report and answer any questions the Committee may have concerning its report.

**[Attachment\(s\)](#)**

Citygate Report - OCFA Human Resources Service Level Assessment



# HUMAN RESOURCES SERVICE LEVEL ASSESSMENT

## ORANGE COUNTY FIRE AUTHORITY

SEPTEMBER 11, 2019



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## **EXECUTIVE SUMMARY**

Citygate Associates, LLC (Citygate) is pleased to present one of the first Service Level Assessments (SLA) issued as part of a larger organizational strategic plan for the Orange County Fire Authority (OCFA). For this assessment, Citygate was requested to provide the Human Resources (HR) Department (Department) and OCFA Board of Directors and management with a series of recommendations for multiple-step and/or by-the-year phasing for improvements as needed, a list of staff resources and/or ongoing performance metrics needed for the HR services, and a list of ongoing operational best practices/metrics within which the Department can operate.

Originally founded by a group of cities to be a regional fire services provider, the OCFA has been a forerunner in fire and public safety services, providing contract services under an appointed governance board model to grow into an agency serving more than 1.9 million people across 24 cities and the unincorporated areas of Orange County from 80 stations throughout Orange County. Coverage provided by OCFA includes a geographic area containing many Southern California beach communities, business towers and complexes for global and national corporations, expansive shopping centers, worldwide vacation destinations, and numerous major freeway and arterial road systems, in addition to many variations on multiple- and single-family residential developments built in the hillsides and flatland areas of this densely populated region between the cities and suburbs of Los Angeles and San Diego.

For OCFA to become a dynamic, leading-edge organization that delivers the best services in the region, it needs support from a highly effective and professional HR Department. Citygate has identified three important positioning objectives for the HR Department at OCFA in the future:

- ◆ Becoming an organizational strategic partner
- ◆ Improving organizational support
- ◆ Achieving recognition as an employer of choice.

Citygate has based its findings and recommendations for this assessment on these three important positioning objectives for OCFA that can be used to guide OCFA's efforts.

This assessment focused on the OCFA HR Department, examining operations and staffing in place to deliver services both internally to this large and complex organization and externally to the public served by OCFA.

The success of any public agency in providing quality services depends on the support and effectiveness of its HR department. Often an HR department is referred to as the conscience of an organization. HR is responsible for overseeing the most valuable resource of any organization, its employees. HR departments follow and support employees from the time they are job applicants through their careers until retirement.

HR departments are a valuable resource in guiding supervisors and managers through the multiple and complex rules, regulations, and laws that regulate personnel actions.

At OCFA, HR services include:

- ◆ Delivery of recruitment and selection services
- ◆ Delivery of employee benefits
- ◆ Delivery of employee relations services
- ◆ Delivery of risk management services.

After conducting extensive interviews and background information reviews, Citygate's HR SLA provides OCFA, its leaders, and staff with 23 findings and 27 recommendations. The recommendations are presented in an Action Plan, found in **Section 6**, that is complete with an identified responsible party, a time frame for completion, and a statement of benefits that can occur with implementation of each recommended action. Time frames for completion are also described after each recommendation is shown in the body of this report.

The Action Plan is accompanied by recommendations for OCFA leadership and staff to use near term as they address the changes and improvements outlined in this SLA report for HR staffing and performance measures which are expanded into eight strategic best practices and metrics. These are also contained in **Section 6**.

The proposed staffing and performance measures speak to specific staff additions and/or changes that are recommended as a result of the information studied and interviews conducted for this assessment. The staff positions recommended represent Citygate's evaluation of gaps and inefficiencies noted over the course of this assessment, as well as Citygate's estimates of what is needed to move OCFA forward.

The list of eight governing operational best practices and metrics is foundational to good, modern HR practices and should become integral to OCFA's *strategic* operations in the future.



## **SECTION 1—INTRODUCTION AND BACKGROUND**

### **1.1 GOALS OF THE ASSESSMENT**

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This Service Level Assessment is one of eight to 10 internal business/service unit assessments to be provided as part of an overall Strategic Plan in mid-2020, and as such, is presented as a standalone report ready for presentation to the Board of Directors, partner agencies, and OCFA employees.

Over and above OCFA's stated outcome requests for this assessment, Citygate has identified three positioning objectives, discussed in **Section 3**, to help guide this large and complex organization as it seeks to refine its strategic direction. Citygate has used these objectives as background for the 23 findings and 27 recommendations made in this report. Findings and recommendations are grouped together into two sections: one focused on internal HR Department operations (**Section 4**) and one focused on cultural and organization-wide impacts (**Section 5**). In addition, in **Section 6**, Citygate has provided three separate tables and/or lists of valuable performance goals and metrics for policy makers and staff to implement.

### **1.2 PROJECT APPROACH AND SCOPE OF WORK**

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Citygate conducted 22 initial on-site interviews. These interviews were followed by additional telephone and conference calls, extensive review and study of the documentation provided by the HR Department and OCFA, and additional on-site reviews and briefings. This work took place during the months of April, May, and June of 2019.

The breadth and depth of the employees interviewed for this report is shown in the following list. At the time of the on-site visits, OCFA was experiencing turnover in the ranks of HR personnel. The people interviewed by Citygate staff during this assessment may no longer be the current occupants of any given positions in the following list. Regardless of personnel changes that may have occurred over the course of this assessment, Citygate is confident that the findings and recommendations for future staffing, operations, and resources needed by the Department will be of service not only to HR staff but to OCFA overall.

Citygate's interviews were conducted with:

#### **1.2.1 Employee Associations**

- ◆ President, Orange County Professional Firefighters Association (OCPFA), International Association of Fire Fighters (IAFF) Local 3631
- ◆ General Accounting Manager, OCFA Management Association (OCFAMA)
- ◆ Management Analyst, OCFAMA



- ◆ Labor Relations Specialist, Orange County Employee Association (OCEA)
- ◆ Assistant Fire Marshal, OCEA
- ◆ Vice President, OCFA Chief Officers Association (COA)

### **1.2.2 Executive Management**

- ◆ Deputy Chief, Administration and Support Bureau
- ◆ Deputy Chief, Emergency Operations Bureau

### **1.2.3 HR Department**

- ◆ HR Manager, Benefits Division
- ◆ Senior HR Specialist, Benefits Division
- ◆ HR Manager, Recruitment and Selection Division (and Employee Relations Division)
- ◆ Senior HR Analyst, Recruitment and Selection Division
- ◆ HR Analyst, Recruitment and Selection Division
- ◆ Risk Manager, Risk Management Division
- ◆ Risk Management Analyst, Workers' Compensation, Risk Management Division
- ◆ Risk Management Specialist, Workers' Compensation (transferred to Recruitment and Selection Division as an HR Analyst), Risk Management Division
- ◆ Risk Management Specialist, General Liability and Insurance, Risk Management Division
- ◆ Fire Captain, Cancer Awareness and Prevention Program, Risk Management Division
- ◆ Fire Captain, Wellness and Fitness (WEFIT) Coordinator, Risk Management Division

### **1.2.4 Logistics Department**

- ◆ Assistant Chief
- ◆ Manager, Information Technology (IT) Division
- ◆ Management Analyst, IT Division Banner System

### **1.3 REPORT ORGANIZATION**

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**Section 2—OCFA Human Resources Role, Structure, and Services** first describes the purposes behind a modern HR department and its importance to the success of modern agencies. The section also includes an HR Department organizational chart, current at the time it was provided to Citygate, and a brief description of the work assigned and accomplished to each of the four HR Department divisions existing at the time Citygate undertook this assessment.

**Section 3—New Horizons for OCFA Human Resources Department** examines three positioning objectives that can be used to guide OCFA’s efforts and provides a basis upon which the 23 findings and 27 recommendations were made.

**Section 4—Needed Department Operational Changes** is focused on internal operational changes needed in HR, presenting findings and recommendations grouped into the distinct areas of:

- ◆ Department operations, practices, and resources
- ◆ Foundation, structure, and planning
- ◆ Outreach recruitment and diversity
- ◆ Employee performance evaluations.

**Section 5—Needed Department Cultural Change Initiatives** presents cultural changes benefitting HR and all of OCFA in a series of findings and recommendations grouped by:

- ◆ Human Resources as a strategic partner
- ◆ Enhance training and employee development
- ◆ Embrace technology to enhance service delivery
- ◆ Consider relocating offices of the Director of Human Resources.

**Section 6—Recommendations Plan** contains the Strategic Step Planning (SSP) for the Department and, where it pertains, the organization. Table 1 in this section is the series of recommendations for multiple-step and/or by-the-year phasing for changes needed. This table represents the Action Plan the Department can use to address the recommendations made in **Sections 4 and 5** of the report. It contains the assignment of the responsible party, the timing, and the benefits for each of the recommendations made by Citygate.

Table 2 is a list of staff resources and/or metrics that, in Citygate’s opinion, OCFA and the Department need to procure and/or implement, as itemized by Department division. This table corresponds to recommendations in Table 1 but more specifically addresses staffing needs and/or practice metrics the HR Department needs to achieve.

Finally, a list of eight governing operational best practices and metrics is provided. These are ongoing planning and operational best practices/metrics that OCFA and the Department should institute to achieve state-of-the-art delivery of high-quality human resource services for a modern public organization. Suggestions for the timing of implementation of these broad-range plans and efforts are included.

## **SECTION 2—OCFA HUMAN RESOURCES ROLE, STRUCTURE, AND SERVICES**

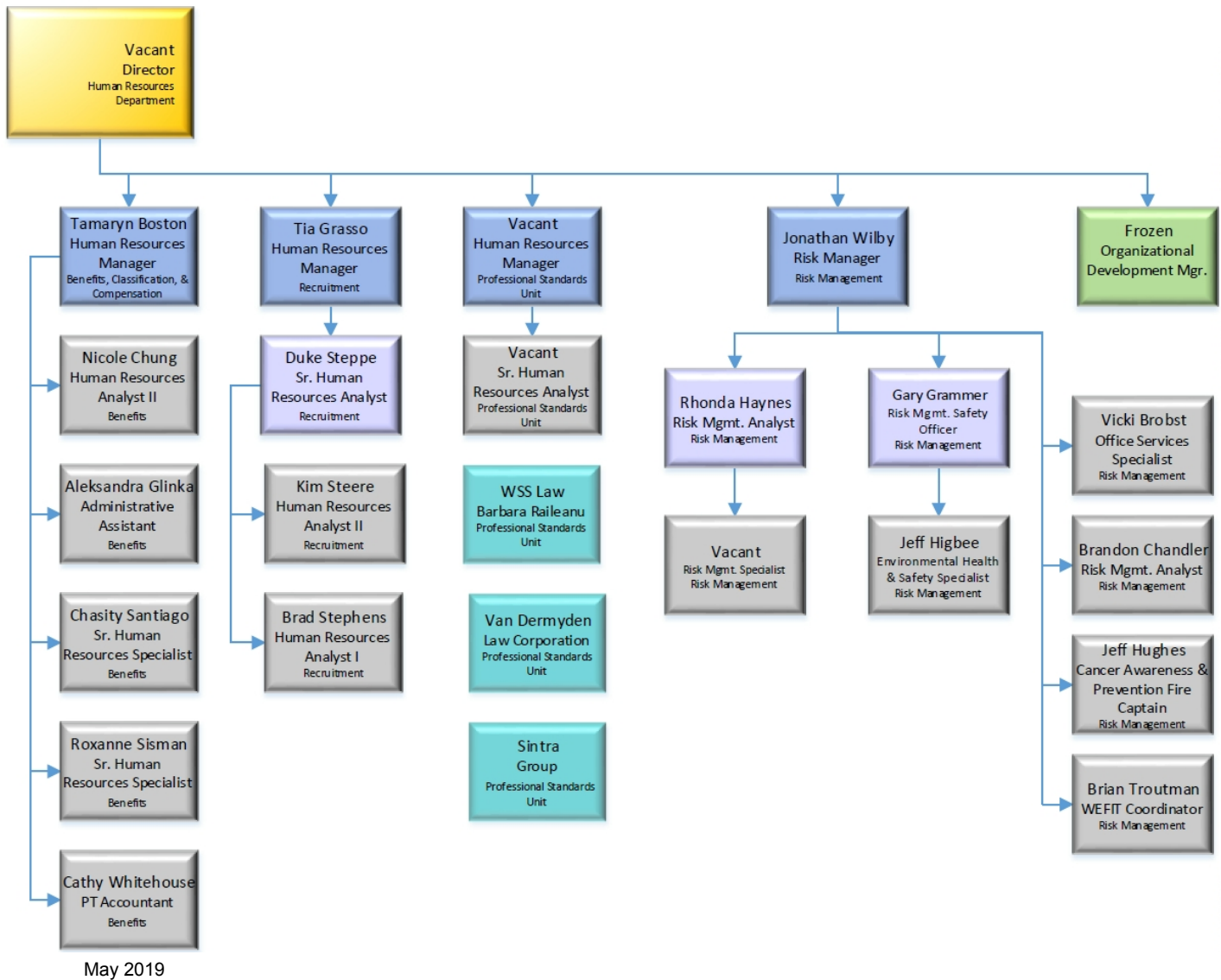
The success of any public agency in providing quality services depends on the support and effectiveness in its HR department. Often the HR department is referred to as the conscience of an organization. HR is responsible for overseeing the most valuable resource of any organization, its employees. HR departments follow and support employees from the time they are job applicants through their careers until retirement.

HR departments are a valuable resource in guiding supervisors and managers through the multiple and complex rules, regulations, and laws that govern personnel actions. They play a critical role in making an agency an employer of choice by effectively recruiting and retaining quality employees, and it is responsible for developing skilled employees who can perform at a high level. To be effective, the HR department must be a strategic partner with the agency's leadership.

At OCFA, the HR Department is a full-service operation with what Citygate observed to be a highly competent staff, producing a high volume of work while serving OCFA's management staff, 1,410 employees, and the public.

The HR Department consists of 24 employees working in four areas: Recruitment and Selection, Employee Benefits, Employee Relations (Professional Standards Unit), and Risk Management.

**Figure 1—Existing OCFA HR Organization Chart**



## **2.1 RECRUITMENT AND SELECTION**

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The HR Department operates under a merit system for the OCFA recruitment and examination employment processes. The HR Department strives to provide OCFA with a highly qualified and diverse workforce.

In the past two years, there were 140 examinations completed by two HR Analysts. This highly professional staff is under constant pressure to complete examination processes in a timely manner. In addition, many of the examination processes are highly sensitive, highly competitive, and exceptionally complex. Amongst those exams, some have attracted large applicant pools.

Following a prior independent review of the OCFA's firefighter recruitment and selection process, the Recruitment and Selection (RS) Division staff began using a guideline that requires firefighter job candidates to achieve a natural score of at least 80 percent to be placed on an eligible list (hiring list).

The RS Division makes efforts to recruit quality and diverse jobs applicants. To accomplish this, it uses online recruiting sources and services to market OCFA job opportunities. RS Division staff also attend a limited number of recruitment events. However, the same HR Analysts responsible for conducting examinations also attend recruitment events. The heavy examination workload limits the amount of time HR Analysts can dedicate to attending outreach activities.

At the end of the examination processes and the creation of eligible lists, the Division arranges pre-employment medical examinations for selected job candidates.

## **2.2 EMPLOYEE BENEFITS**

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The HR Department manages the classification, salary and wages, benefits, onboarding programs, and employee performance evaluations for employees and retirees. Citygate was told that the goal of employee benefits is to ensure employees have a positive work experience.

In the area of classification and compensation administration, Citygate could not find clear direction. Absent established policy or structure on how OCFA as an organization will maintain updated classification specifications, most classification studies and salary surveys at OCFA are completed through agreements with employee associations through memorandum of understanding (MOU) agreements. In addition, Citygate did not find an agency-wide directive regarding salaries and benefits in comparison to an established labor market. Citygate could not discern an established frequency for how often OCFA studies its salaries and benefits; however, the Employee Benefits Division has created a classification specification tracking system to follow and document the progress of classification revisions and adoptions.

The Employee Benefits Division is making gradual progress towards improving the process and tracking of annually evaluating employee performance. Over the past two years, it has implemented automated employee performance evaluations for management employees. However, there are no immediate plans to automate the evaluations of Fire safety personnel and non-safety, line employees, which represent over 1,200 employees.

The Employee Benefits Division has automated the onboarding process for new employees. This new tool has streamlined the hiring process by reducing the completion time and ensuring that all required documents are completed before new employees begin work.



### **2.3 EMPLOYEE RELATIONS (PROFESSIONAL STANDARDS UNIT)**

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The HR Department is responsible for maintaining productive labor and employee relations with the four employee associations.

Over the past year, it was difficult for the HR Department to coordinate labor relations policies with Executive Management. Feedback provided by some that Citygate interviewed indicated that the HR Department took “siloed” positions on contentious issues, which caused some friction with employee associations. The lack of wide collaboration and perceived misinformation created mistrust between the parties, which strained the relationships with some particular members of HR Management. The turnover of the HR Director and the Employee Relations Manager created a further void in growing a healthy working relationship with the employee associations. Efforts by existing HR management staff temporarily assigned to Employee Relations are making positive contributions to relationships between the parties. Currently, there is no full-time staff in the Employee Relations Division. The Recruitment and Selection Manager has been temporarily handling employee appeals/grievances and investigations, with support from contract attorneys who assist with the more complex investigations, as assigned. The lack of full-time dedicated staff limits the Employee Relations Division’s efforts to proactively address employee relations issues.

### **2.4 RISK MANAGEMENT**

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The HR Department administers a comprehensive Risk Management operation that includes a highly successful workers’ compensation program, quality liability and insurance services, and valued employee wellness programs, such as WEFIT, Cancer Prevention Awareness, and Behavioral Health. In 2018, under the workers’ compensation program, 87.3 percent of eligible employees returned to work on light duty, and 85.7 percent of them returned within four days. In 2018/19, the WEFIT program coordinated 648 wellness exams on safety field personnel, or 62.7 percent of the Department. During the same time, the Behavioral Health Program conducted 841 counseling sessions in 23 different counseling topics. The Cancer Prevention Awareness program provided new training to reduce exposure to potential cancer-causing substances.

## SECTION 3—NEW HORIZONS FOR OCFA HUMAN RESOURCES DEPARTMENT

### 3.1 CHALLENGES FACING HR

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The HR Department is routinely challenged to deliver services on a timely manner. However, there are multiple competing parties with unique priorities that influence the direction of the Department and thus impact the timely completion of service delivery. HR-based requirements and mandates are constantly evolving, and the HR Department consistently reviews and implements new regulations to ensure compliance.

Citygate's review of services administered by the HR Department revealed that the Department at times does not meet the services/pace needs of OCFA operations; however, the Department does adhere to regulatory requirements. The OCFA HR Department is a full-service department that manages multiple HR functions. The HR industry is highly regulated with numerous federal, state, and court statutes and mandates that dictate how HR functions and responsibilities are performed. Keeping track of all the different rules and regulations is a challenge. In addition, the HR Department routinely gives advice on HR issues and mandates that are drawn from multiple sources.

For OCFA to become a dynamic, leading-edge organization that delivers the best services in the region, it needs the support from a highly effective and professional HR Department. Currently, the HR Department completes a high volume of work and quality services with a competent and dedicated staff. Citygate has identified three positioning objectives for guiding OCFA and the Department to improvements needed to ensure high quality services for all stakeholders served by OCFA:

- ◆ Becoming an organizational strategic partner
- ◆ Improving organizational support
- ◆ Achieving recognition as an employer of choice.

Citygate based our findings and recommendations for this assessment on these three important positioning objectives for OCFA that can be used to guide OCFA's efforts.

- ◆ **Section 4** is focused on internal operational findings and recommendations central to the HR Department. The findings and recommendations are grouped under four key areas of the internal HR Department operations.
- ◆ **Section 5** is focused on findings and recommendations that apply and/or affect the overall OCFA organization and culture. The findings and recommendations are grouped under four key areas of the culture and overall OCFA organization.

What follows is a brief description of what it means for OCFA and its HR Department to pursue these three big-picture objectives in the near- and longer-term future.

### **3.2 BECOMING AN ORGANIZATIONAL STRATEGIC PARTNER**

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Although the HR Director is a member of the executive team, the HR Department is not a strategic partner to top management. The HR Department has very little influence or input in major organizational decisions. The perception in the HR Department is that it is routinely called upon to address unplanned urgent issues that could be avoided with advanced planning and sound decision-making. As a result, it regularly finds itself in crisis mode. Further, it is assigned additional tasks and responsibilities with little or no input or discussion. To better serve OCFA, the HR Department needs to become a strategic partner.

### **3.3 IMPROVING ORGANIZATIONAL SUPPORT**

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A review of HR Department staffing levels found that there is an imbalance in distribution of staff that causes inefficiency. Most of the HR Department divisions have minimal clerical support. To complete work, some clerical staff must rotate into other divisions. In addition, to complete work in a timely manner, professional Analysts and Division Managers routinely perform clerical tasks. Further, Division Managers are given additional responsibilities without additional resources or staff. For example, the Risk Manager is managing a Behavioral Health program, with an external contracted firm (The Counseling Team International), but does not have any internal dedicated support staff for this area. A Behavioral Health professional, on OCFA staff, would be beneficial to fully implement the program. When the Benefits Division implements agency-wide automated employee performance evaluations, it will need an additional HR Specialist to complete the work. To help OCFA move forward in better serving the public, the HR Department must have the appropriate level of staffing in each Division to address the needs of OCFA.

The HR Department is responsible for many rules and regulations and the processes that carry them out. OCFA general orders, standard operating procedures, regulations, policies, and procedures are found in different locations and sources. There is no formal policies and procedures document or manual that can be used as a resource. In addition, the Department completes some functions with unwritten policies and practices. To improve the effectiveness of the HR Department and respond to the demands of the organization, more policies and practices must be written into a thorough policies and procedures manual, which shall include existing policies and procedures.

### **3.4 ACHIEVING RECOGNITION AS AN EMPLOYER OF CHOICE**

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OCFA strives to become the best agency possible. Reaching that goal begins with becoming an employer of choice through the recruitment and hiring of the best job candidates. This involves

OCFA marketing itself as an employer of choice through an aggressive outreach recruitment plan. The plan should stress the goal to recruit a highly qualified and diverse applicant pool. Recruitment activities should expand to non-traditional venues and events. Support from the employee associations will be critical to the success of these efforts. A more diverse applicant pool will improve the quality of job applicants.

To ensure that OCFA is offering competitive wages and benefits, it needs to develop a strategy for the periodic study of classification specifications and for conducting salary surveys. Further, it must establish policy concerning where it wishes to rank its employee classifications in the labor market regarding salary and benefits.

To retain quality employees, OCFA must develop an Organization Development Division to support employees with their professional growth. The efforts should include succession planning to identify and develop future leaders. In the current competitive job market, quality employees will not hesitate to leave an employer that does not make a commitment in their professional development.

All the components stated above are necessary for OCFA to become an employer of choice that attracts and retains quality employees who will, in turn, deliver a higher quality of service and help OCFA reach its goal of being the best agency possible.

As it seeks new horizons for its HR Department services and operations, agency leaders, managers, staff, and sworn and non-sworn employees alike can work together toward the goal of positioning OCFA as a local and regional leader, demonstrating an effective role for its HR staff, developing strong organizational support systems, and becoming an employer of choice amongst public and private agencies in Orange County and the entire Southern California region.

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## **SECTION 4—NEEDED DEPARTMENT OPERATIONAL CHANGES**

The OCFA HR Department has four broad areas of its current operations in which to address future improvements. These are:

- ◆ Operations, practices, and resources
- ◆ Foundation, structure, and planning
- ◆ Outreach recruitment and diversity
- ◆ Employee performance evaluations.

### **4.1 OPERATIONS, PRACTICES, AND RESOURCES**

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#### **4.1.1 Findings**

**Finding #1:** The HR Department operates with antiquated tools and practices.

- ◆ Policies and procedures related to the OCFA HR Department are found in different sources, such as Employee Relations Resolution, Personnel and Salary Resolution, MOUs, standard operating procedures, and memorandums. For the purpose of reference or research, there is not a single source available that collects all HR information.
- ◆ The HR Department completes many responsibilities with policies and processes that are routinely used but not found in any written document.

**Finding #2:** OCFA is limiting its access to a larger pool of quality and more diverse job candidates by using an 80 percent passing score for safety examination processes.

The intent of the OCFA in setting an 80 percent pass score was presented to Citygate as an effort to limit the applicant pool for exam processes that attract large numbers of job applicants (a common occurrence within the firefighting profession). Also, Recruitment and Selection (RS) Division staff stated that they have not received any complaints from job applicants regarding the pass score requirement. The practice of limiting job applicants or the fact that no applicants have complained are not legitimate reasons to support business necessity. In fact, OCFA's argument that setting a high passing score ensures higher quality candidates accomplishes the opposite.

The HR Department RS Division completes a high volume of examination and selection processes with minimal staff. Examination and selection processes are highly professional, but the evaluation of candidates is restrictive and potentially could adversely impact minority and women job candidates. One of the basic standards of conducting examination processes is that employers take measures to ensure that the employment examination processes be valid and job-related.



Evaluating examination processes for potential adverse impact is a required practice to determine if they are valid. Adverse impact is defined as a low passing rate of group(s) of job applicants when compared to another, more successful group of applicants (e.g., a comparison of white job applicants to minority applicants). The Uniform Guidelines on Employee Selection Procedure requires the use of a standard formula for measuring potential adverse impact. It takes the average score of one group (e.g., white applicants) and compares to the average score of another group (e.g., Hispanic applicants). If the average score of the Hispanic applicants is less than 80 percent of the white applicants, then the exam has, on first impression, adverse impact. This is commonly referred to as the four-fifths rule. In response, the employer must prove that the examination process is valid and job-related or that there is a rational business necessity for a given practice.

The HR Department regularly uses content criterion to validate most of its examinations. For the Fire Recruit examination and other complex exams, HR uses outside vendors to provide valid examination instruments. However, HR does not use the four-fifths rule to measure any of its examination processes. In fact, HR uses a score of 80 percent as a standard pass score for all safety examination processes regardless of the potential adverse impact on any specific group. HR argues that it uses the 80 percent pass score to ensure that it hires only highly qualified job candidates. For non-safety examinations, HR uses an 80 percent passing only for oral interviews. This 80 percent passing score requirement is an arbitrary number that is simply indefensible.

A standard industry practice is to independently evaluate each examination process and component for potential adverse impact. It should be the goal of any examination process to assess the probability of success on the job. Thus, determining an appropriate pass score should include flexibility as each applicant pool in any examination process is unique. The use of any arbitrary passing score is indefensible and not consistent with the Uniform Guidelines.

#### **4.1.2 Recommendations**

**Recommendation #1:** Develop a comprehensive HR Policies and Procedures Manual to act as a centralized source for reference.

The HR Department needs to implement a project that gathers all its information resources, both internal and external, and reviews and assesses them for the purpose of creating a single resource. The use of an outside vendor to complete this task is highly recommended. The goal should be to complete this project within six months.

**Recommendation #2:** Develop an Operations Manual that outlines specific steps to complete a task or program.

Use the manual as a training tool and resource for HR employees. The Operations Manual will correspond to the HR Policies and Procedures Manual cited in Recommendation #1. An Operations Manual can be created within 18 months.

- Recommendation #3:** Independently review each examination process and components to measure potential adverse impact. In those cases where review finds that adverse impact exists, evaluate the exam process to ensure it is valid and job-related.
- Recommendation #4:** Abandon the 80 percent passing score requirement for all examination processes. Independently evaluate each exam process and determine a reasonable cutoff score that minimizes adverse impact.
- Recommendation #5:** Review performance standards and practices for probationary employees, especially for the Fire Recruit academy.

Employee probationary periods are often referred to as the last examination process. Much effort and resources are expended to create an eligible list for Fire Recruits, which is annually established to hire 100 new Fire Recruits. It is critical that *as soon as possible*, all new sworn and non-sworn probationary employees be evaluated on valid job-related standards.

## **4.2 FOUNDATION, STRUCTURE, AND PLANNING**

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### **4.2.1 Findings**

**Finding #3:** The HR Department is a full-service HR operation that completes a wide range of HR functions in a highly demanding environment, with very active board and influential employee associations.

The HR Department performs a highly delicate balancing act as an internal and external service department, an advisor to management, a collaboration builder, and a compliance overseer for the organization. To be effective in such an environment, the HR Department requires a clear vision or purpose, a strong commitment from top management and the Board, and sufficient resources to complete its responsibilities. HR Department staff are competent and dedicated professionals as evidenced by:

- ◆ The Employee Relations (ER) Division has initiated collaborative efforts with the employee associations and has engaged them in early discussions when issues arise.
- ◆ The two HR Analysts in the RS Division are highly productive, but overwhelmed. Over the past two years, they completed 140 examination processes, including lengthy fire safety entry-level and promotional exam processes. In addition, they attend an average of five outreach recruitment job/career fairs per month.
- ◆ In 2002, the Risk Management (RM) Division initiated a workers' compensation program. Today, the program is fully operational, and it effectively handles

employees injured on the job. In 2018, 87.3 percent of eligible employees returned to work on light duty, and 85.7 percent of them returned within four days.

- ◆ In 2018/19, the WEFIT program coordinated 648 wellness exams on safety field personnel, or 62.7 percent of the Department.
- ◆ In 2018/19, the Behavioral Health Program conducted 841 counseling sessions in 23 different counseling topics.
- ◆ Since the inception of the Fire Agencies Insurance Risk Authority (FAIRA), a general liability insurance program, in 2015, OCFA has handled 91 FAIRA claims in five service categories at a cost of \$1,208,100.
- ◆ The Benefits Division manages the OCFA classification and compensation programs. Recently it created a classification and salary adjustment tracking program to accurately account for all such changes and adjustments. The Benefits Division also manages employee performance evaluations for all employees. The Benefits Division initiated automated programs to improve service delivery and increase efficiency. In 2017, it started an electronic employee performance program for management personnel (NEOGOV Perform). In September 2018, the Division installed an automated onboarding system (NEOGOV Onboarding) for processing new employees into the workforce.

**Finding #4:** The HR Department lacks vision, core values, or principals to guide staff toward a desired mission.

The Department constantly responds to crisis after crisis, and it is always in a reactionary mode. When the HR Department is directed to initiate a new program or service, it is regularly accomplished without additional resources or any consideration to the impact on the Department. There are no core values or principles to guide the staff toward a desired mission. There are no meaningful objectives, performance measures, metrics, or goals to accomplish. This lack of performance measures and metrics limits HR's ability to measure its work product, demonstrate its value to OCFA, and effectively evaluate the performance of its employees.

**Finding #5:** The HR Department lacks a coherent plan to fulfill OCFA staffing and HR-related needs.

To be effective, any HR Department should have a coherent written plan that guides the organization, a clear direction with specific measurable objectives, and action items that complements its mission statement for the delivery of quality service.

**Finding #6:** Imbalance in the HR staffing structure and increasing demands for services creates instability in the Department.

Due to recent resignations/vacancies, the ER Division does not have any full-time staff. Currently, the RS Human Resources Manager is the only person performing employee relations work. In addition, the ER Division does not have any dedicated administrative staff support.

- ◆ At times, the HR Department managers are given new programs to administer without any additional staffing resources. When the RM Division was assigned the WEFIT program and Cancer Prevention Awareness program, sworn fire personnel were assigned to manage the programs. However, the Behavioral Health Program (which has an external contract with The Counseling Team International) did not come with any internal support and it is administered by the Risk Manager. Currently, the Risk Manager spends 21 percent of his time on the Behavioral Health Program. To ensure the timely completion of projects and assignments, support staff regularly cross between divisions to assist colleagues. Due to the demands of other divisions, the Benefits Division routinely rotates administrative support staff to the other divisions to assist with completing tasks.
- ◆ The Risk Manager administers security activities for all OCFA facilities and stations, without any staffing assistance or plan and without access to expertise necessary to conduct this work. Currently the Risk Manager spends 10 percent of his time addressing security-related matters. Security activities do not belong with Risk Management. OCFA needs to find a permanent solution.
- ◆ Although there is support staff in the HR Department, it is minimal, which requires the professional and management employees to routinely perform clerical tasks.

A productive HR Department operates with a clear understanding of the services it is mandated to provide and the priorities its leadership has given with an organization structure and resources that fulfill those demands.

**Finding #7:** The HR Department completes classification and compensation activities without a strategy or direction.

Most classification and compensation activities are generated through specific actions agreed upon through MOUs with employee associations. There is no established schedule to conduct classification specification reviews throughout the organization, no plan on how often classifications should be studied, no clear direction that prioritizes which classifications need to be studied, and no strategy on where OCFA desires to be ranked in compensation among its established salary survey agencies. Classification and compensation studies are conducted by outside vendors.

**Finding #8:** The HR Department conducted a classification study in three of the four Divisions to revise classifications to create a career path for Department employees. The RM Division was not included in this initial classification study. The RM Division was

included in a subsequent phase; however, the study remained incomplete at the time Citygate conducted its on-site interviews.

**Finding #9:** The HR Department plays a key role in maintaining harmony between agency leadership and the employee associations.

An HR department must clearly communicate an agency's direction in employee relations and effectively listen to, and address, employee associations' concerns. To develop a strong working relationship with employee associations, the HR Department must do its part to gain trust and respect. For many months, the relationship between some members of the HR Department and employee associations has been confrontational and strained; nevertheless, positive inroads are being made through collaborative efforts by the current HR managers.

**Finding #10:** Although OCFA has a robust agency-wide recognition program, there is no such employee recognition program designed specifically for the HR Department.

#### **4.2.2 Recommendations**

**Recommendation #6:** Create a concise mission statement with a vision, core values, and guiding principles, as well as specific and measurable performance objectives that will deliver quality service to OCFA and the public.

This exercise will require six months to complete.

**Recommendation #7:** Develop a systematic method of identifying, evaluating, and addressing HR Department issues to minimize disruption in the Department when a crisis does arise.

It will require nine months to develop a systematic method for addressing HR issues.

**Recommendation #8:** Determine the staffing necessary to meet HR service demands by assessing the level of service delivery desired and OCFA priorities.

This project can be completed in six to nine months.

**Recommendation #9:** Build trust and respect with employee associations through collaborative working relationships while ensuring transparency. Recommended actions include:

- ◆ The ER Division should take the lead in re-establishing relationships with the employee associations after receiving staffing necessary to support this effort.

- ◆ The Benefits Division should take the lead in developing an agency-wide philosophy and strategy for implementing a comprehensive classification and compensation plan.

The development of a salary survey master plan can be created within 12 months. The creation of a comprehensive classification review schedule can be completed within six months.

**Recommendation #10:** Re-initiate the study of the classifications in the RM Division to create a professional career path.

The study of classifications in the RM Division can be completed within six months.

**Recommendation #11:** Hire a Behavioral Health professional to relieve the Risk Manager of directly administering the program while continuing to support the WEFIT and Cancer Awareness programs with safety personnel, under the direction of the Risk Manager.

The creation of a Behavioral Health Professional classification will take nine months after funding is identified and prioritized.

**Recommendation #12:** Obtain security expertise for protecting facilities and provide the resources necessary to effectively perform the agency's security-related work. Transfer security responsibilities outside of HR.

Assess where best to assign the security-related function outside of HR. The review of security needs and the transition of the duties outside of HR will require 12 months to complete.

**Recommendation #13:** Develop specific and measurable performance objectives for employee performance standards. Prepare an annual HR Department performance report that highlights the Department's accomplishments for the year.

The study of all duties of HR staff members and subsequent development of measurable performance objectives will take 12 months. The annual HR report can be completed within two months after the end of the fiscal year.

**Recommendation #14:** Develop an employee recognition program for the HR Department employees, which can be variable as to frequency and type rather than just one annual award. Recognize and celebrate smaller, significant accomplishments, anniversaries, etc.

The research and creation of an employee recognition program tailored for HR employees will take six months.



### **4.3 OUTREACH RECRUITMENT EFFORTS AND DIVERSITY**

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#### **4.3.1 Findings**

**Finding #11:** Recruitment and Selection Division HR Analysts produce a high volume of examination processes with minimal staff.

The limited number of recruitment-related events HR Analysts attend are insufficient to effectively attract a quality and diverse applicant pool and takes valuable time away from the HR Analysts to complete the high demand of examination processes. Given the current staffing levels, the best solution is for the HR Analysts to stop attending recruitment events and focus on timely completion of examination processes.

**Finding #12:** A comparison of demographic data shows that the OCFA workforce falls short in reflecting the community it serves.

Demographic data reveals that Orange County's population is changing and becoming more diverse. The last U.S. Census revealed that the Orange County demographic profile is as follows: White (42 percent), Hispanic (33.9 percent), African American (1.6 percent), Asian (19.2 percent), and Other (3.3 percent). The current OCFA ethnic workforce composition is as follows: White (69 percent), Hispanic (20 percent), African American (1 percent), Asian (7 percent), and Other (3 percent).

The current OCFA gender workforce composition is 11 percent women and 89 percent men.

#### **4.3.2 Recommendation**

**Recommendation #15:** Create and implement a strategy for employing a workforce that reflects the community by:

- ◆ Assessing the workforce and labor market to establish a geographic marketing area for recruiting.
- ◆ Designing an aggressive outreach plan that can realistically attract quality and diverse job applicants. This work should be performed in collaboration with management and the employee associations.
- ◆ Creating an outreach recruitment team dedicated to marketing the OCFA as an employer of choice. Funds will be needed to support the recruitment efforts, and employee volunteers will be needed to attend recruitment events.

It will take six months to develop an outreach recruitment program.

## **4.4 EMPLOYEE PERFORMANCE EVALUATIONS**

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### **4.4.1 Finding**

**Finding #13:** Over the past year, only 67.36 percent of OCFA employees received an employee performance evaluation; 29.53 percent of employee evaluations are past due (as of the writing of this report), and 3 percent are incomplete.

There is no consistent accountability to encourage or mandate a higher completion of evaluations.

There is no employee performance evaluation training for supervisors to learn how to properly complete an employee evaluation or how to effectively communicate the contents of an employee performance evaluation given to an employee.

There are no written guidelines on how to complete an employee performance evaluation form.

The Benefits Division implemented electronic employee performance evaluations through NEOGOV Perform for executive management, fire management, and non-sworn managers. However, this represents only a small percentage of the total workforce.

Employee performance evaluations for fire line personnel and OCEA employees are completed manually. There is a need to revise and update employee performance evaluation forms and develop a guide for performance standards.

There are no plans to implement NEOGOV Perform for 207 OCEA employees or 1,036 sworn fire personnel. It is the opinion of HR staff that one additional staff person would be required if the OCFA implemented NEOGOV Perform for the OCEA and sworn fire personnel.

### **4.4.2 Recommendations**

**Recommendation #16:** Develop a strategy and process to increase the completion rate of employee performance evaluations.

The development of a strategy and process to increase the completion rate of employee performance evaluations will require 12 months to complete.

**Recommendation #17:** Research and develop a plan to expand the use of NEOGOV Perform for all OCFA employees, including new performance evaluation forms, and commit resources for additional staff, if required.

The expansion of NEOGOV Perform for all employees will require 12 months to complete.

**Recommendation #18:** Develop a required employee performance evaluation training course for supervisors and managers, teaching supervisors and managers how

to properly complete the performance evaluation and effectively communicate the ratings in the performance evaluation.

The development and implementation of a new training course can be completed within 17 months.

**Recommendation #19:** Develop accountability for completion of performance evaluations through the creation of a job performance standard for supervisors. Include the completion of performance evaluations as a factor in determining merit salary increases for supervisors.

The implementation of this concept will require six months to complete.

## **SECTION 5—NEEDED DEPARTMENT CULTURAL CHANGE INITIATIVES**

There are four cultural change initiatives needed to move OCFA forward into the future. These are:

- ◆ Human Resources as a strategic partner
- ◆ Enhance training and employee development
- ◆ Embrace technology to enhance service delivery
- ◆ Consider relocating offices of the Director of Human Resources.

### **5.1 HUMAN RESOURCES AS A STRATEGIC PARTNER**

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#### **5.1.1 Findings**

**Finding #14:** There is not a clear understanding of the role that the HR Department should play in OCFA, and significant competing and influential parties seek to direct the HR Department in different ways, including the OCFA Board Human Resources Committee, top OCFA management, and OCFA employee associations.

Often these competing parties have different agendas, which makes it difficult for HR to prioritize its service delivery. These parties need to understand the unique role HR plays as a service department with regulatory responsibilities, serving operating departments, employees, and the public. This circumstance requires that HR operate independently and free of political influence. Often, HR makes a decision that requires consideration of the affect it will have on multiple parties and may be unpopular. Critiquing a critical decision should be done within the chain of command and labor relations framework. HR staff also need to know the Board of Directors and Executive Management policy/values directions for decisions in gray areas.

**Finding #15:** Based on interviews with HR Department staff, they are consistently asked to resolve significant problems or complaints with no advanced notice. The perception is that the HR Department regularly finds itself in a crisis mode, but the in-house expertise of the HR staff is not fully utilized when an issue first emerges.

To be effective, the HR Department should be involved in the initial discussions and early planning stages of any significant initiative. Often, new policies and programs will have an impact on staffing needs and costs, regulatory statutes, or existing contacts, such as MOUs. The HR Department would be in a much better position to offer sound counsel and support if given ample advance notice of proposed policies or programs that are under consideration.

### 5.1.2 Recommendations

**Recommendation #20:** Demonstrate a strong commitment to the mission and vision of the HR Department by:

- ◆ Strengthening the HR Department's inclusion in major OCFA decisions.
- ◆ Planning new OCFA programs or assignments in collaboration with the HR Department to minimize the time the HR Department spends operating in a reactionary mode.
- ◆ Allowing the HR Department to operate within agency policies and values without interference outside of the chain of command and labor relations discussions.
- ◆ Relying on the HR Department to provide sound and credible advice.

These steps to demonstrate a commitment to HR can be supported immediately.

**Recommendation #21:** Consider studying the transfer of major and sensitive alleged employee misconduct investigations from the Employee Relations Division to a new and separate unit that is accountable to and reports directly to the Fire Chief or a Deputy Chief.

The study can be completed in 12 months.

## 5.2 **ENHANCE TRAINING AND EMPLOYEE DEVELOPMENT**

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### 5.2.1 Findings

**Finding #16:** OCFA provides required technical training for its fire personnel. New Fire Recruits receive 16 weeks of academy training before they are promoted to Firefighter. Other Fire personnel receive remedial training to ensure a high level of skill is retained.

Professional development and growth of employees is essential to success in any organization. Employee professional development and growth, or organizational development, has become a core HR function. The main purpose of organizational development is to enhance employees' skill sets and to minimize employee turnover. Conducting a selection examination process to hire new employees is costly. Maintaining higher employee retention levels is more cost-effective than conducting a selection process to hire someone, and it is an excellent employee morale builder.

OCFA defunded the Organizational Development (OD) Division and abandoned critical employee development for all employees. It moved the funds from the discontinued OD Division to Emergency Medical Services (EMS) operations training and initiated the L380 Leadership training class, which now represents the only professional training in the OCFA.

**Finding #17:** Within OCFA, para-professional employees at the professional, technical, and support staff levels are promoting into supervisory classifications without any formal training.

The transition from a staff-level position into a supervisory role requires many new skill sets. Formal training in supervisory and leadership skills helps future supervisors prepare for new job demands in this role.

Succession planning to prepare an agency for future position vacancies is a critical component to maintain a high employee retention rate. Succession planning demonstrates an agency's commitment to its employees' professional growth by identifying and assessing employees for potential future growth. There is no discernable succession planning at OCFA.

## **5.2.2 Recommendation**

**Recommendation #22:** Reinstitute the Organization Development Division and place it under the HR Department. Allow the Division to:

- ◆ Perform a thorough study of the OCFA's professional training needs and desires.

This item can be completed within 12 months after funding is identified and prioritized.

- ◆ Develop a comprehensive training program that supports employee professional development, leadership development, and succession planning.

This item can be completed within 12 to 18 months.

## **5.3 EMBRACE TECHNOLOGY TO ENHANCE SERVICE DELIVERY**

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### **5.3.1 Findings**

**Finding #18:** OCFA has not consistently embraced available technology to improve the quality of service, which results in delays in service delivery.

**Finding #19:** The HR Department has increased the use of technology to enhance service delivery. However, some of its efforts to acquire automated systems or upgrade programs have not been supported and or resourced to completion.

For example, employees' electronic files are not easily accessible, and not easy to use. For the workers' compensation program, the RM Division requested access to employee data to complete injury reports for injured employees in a timely matter. The data needed is in the Banner system. The request was denied because of a concern for breaching employee personal and confidential data. The RM Division is initiating an electronic system (Velocity) to engage safety programs.

**Finding #20:** Internal communication systems are outdated, cumbersome, and ineffective, which results in more workload and delay in service delivery. The approval routing system is performed via interoffice mail. At times it can take several days to complete a routed approval document.

**Finding #21:** Some management systems and processes are antiquated, such as the use of paper timesheets to record non-sworn personnel work hours. The time sheets for non-safety employees are entered manually.

**Finding #22:** Interview panelists and performance exam raters use paper and pens to take notes when evaluating and rating job candidates, a work-intensive practice.

The collection and recording of candidates' performance would be more accurate and more quickly tabulated using computer devices, such as tablets, to document the performance of job applicants.

### **5.3.2 Recommendations**

**Recommendation #23:** Work with the IT Division within the Logistics Department to develop enhanced protection of employee personnel files so that data can be shared with Risk Management and third-party secure sites to complete required reports in a timely manner.

The initial discussion on this item can begin immediately.

**Recommendation #24:** Research and implement an automated signature program that will electronically send documents under a secure system to internal parties required to sign any document.

The research and implementation of an automated signature program will take six months.

**Recommendation #25:** Support the July 2019 implementation of electronic employee time sheets for non-safety personnel.

Full implementation of a new program shall be completed by December 2019.

**Recommendation #26:** Study the feasibility of providing exam raters with tablet computers (e.g., iPads) to record exam performance, leading directly to more effectively tabulating scores and retaining examination records.



The study and implementation of tablet computers for examination scoring can be completed within nine months.

#### **5.4 CONSIDER RELOCATING OFFICES OF THE DIRECTOR OF HUMAN RESOURCES**

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##### **5.4.1 Finding**

**Finding #23:** The HR Department needs strong leadership to build a team and a strong Department foundation and become a strategic partner in OCFA to provide quality service to the agency and to the public. The working relationship and trust between the HR Director and staff are essential to the success of the Department.

Currently the office of the Human Resources Director is located with the Executive Offices of the OCFA, across the hall from the HR Department, which separates HR staff from their leader and funnels the primary interaction with staff through division managers. The separation of the HR Director from staff weakens the interconnection, communications, and potentially the trust within the HR Department.

##### **5.4.2 Recommendation**

**Recommendation #27:** Revise the office configuration to house the HR Director within the HR Department.

Initiate discussion of HR office configuration upon the arrival of the new HR Director.

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## **SECTION 6—RECOMMENDATIONS PLAN**

This section contains an Action Plan outlining, for each recommendation presented in this report, the responsible party, time frame for completion, and a statement of benefits that can occur with implementation of each recommended action.

The Action Plan is accompanied in this section by two additional instruments for OCFA leadership and staff to use as they address the changes and improvements outlined in this report: proposed HR staffing and performance measures and a list of eight governing operational best practices and metrics. These metrics for ongoing performance will also be inserted into the overall OCFA Strategic Plan following the completion of multiple Service Level Assessments.

**Table 1—Multiple-Step/Year Recommendation Action Plan**

<b>Recommendation</b>	<b>Responsible Party</b>	<b>Timing</b>	<b>Benefit</b>
<b>Recommendation #1:</b> Develop a comprehensive HR Policies and Procedures Manual to act as a centralized source for reference.	HR Department	The use of an outside vendor to complete this task is highly recommended. The goal should be to complete this project within six months.	Create a reliable reference document for the HR Department to perform its duties and eliminate completing tasks without clear written policies and procedures.
<b>Recommendation #2:</b> Develop an Operations Manual that outlines specific steps to complete a task or program.	HR Department	An Operations Manual can be created within 18 months.	Develop a useful tool to ensure the correct method or practice to complete tasks.
<b>Recommendation #3:</b> Independently review each examination process and components to measure potential adverse impact. In those cases where review finds that adverse impact exists, evaluate the exam process to ensure it is valid and job-related.	Recruitment and Selection Division (HR)	This can begin immediately and shall be a continuous effort.	Ensure job relatedness with examination processes and reduce adverse impact in examination processes.
<b>Recommendation #4:</b> Abandon the 80 percent passing score requirement for all examination processes. Independently evaluate each exam process and determine a reasonable cutoff score that minimizes adverse impact.	HR Department, with support from Executive Management	This effort should begin immediately.	Achieve standard industry practice of independently evaluating each examination process and component for potential adverse impact, with the goal of any examination process sufficiently assessing the probability of success on the job.

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Recommendation	Responsible Party	Timing	Benefit
<b>Recommendation #5:</b> Review performance standards and practices for probationary employees, especially for the Fire Recruit academy.	HR Department, with support from Executive Management	This effort should begin immediately.	Achieve assurance that probationary employees are evaluated on valid job-related standards.
<b>Recommendation #6:</b> Create a concise mission statement with a vision, core values, and guiding principles, as well as specific and measurable performance objectives that will deliver quality service to OCFA and the public.	HR Department, with support from Executive Management	This exercise will require six months to complete.	Provide the HR Department with a clear vision on how to complete its responsibilities. Enhance the quality of service delivery.
<b>Recommendation #7:</b> Develop a systematic method of identifying, evaluating, and addressing HR Department issues to minimize disruption in the Department when a crisis does arise.	HR Department, with strong support from Executive Management	This development will require nine months.	Help develop the HR Department as a strategic partner and minimize the crisis mode in which the Department operates.
<b>Recommendation #8:</b> Determine the staffing necessary to meet HR service demands by assessing the level of service delivery desired and OCFA priorities.	HR Department	This project can be completed in six to nine months.	Enhance service delivery with more efficient use of staff.
<b>Recommendation #9:</b> Build trust and respect with employee associations through collaborative working relationships while ensuring transparency. Recommended actions include: <ul style="list-style-type: none"> <li>◆ The ER Division should take the lead in re-establishing relationships with the employee associations after receiving staffing necessary to support this effort.</li> <li>◆ The Benefits Division should take the lead in developing an agency-wide philosophy and strategy for implementing a comprehensive classification and compensation plan.</li> </ul>	HR Director, Employee Relations Division, and Benefits Division	<p>The development of a salary survey master plan can be created within 12 months.</p> <p>The creation of a comprehensive classification review schedule can be completed within six months.</p>	<p>Develop a collaborative and productive working relationship with the employee associations.</p> <p>Create an effective strategy to evaluate classifications and properly compensate OCFA employees.</p>
<b>Recommendation #10:</b> Re-initiate the study of the classifications in the RM Division to create a professional career path.	Benefits Division and Risk Manager	The study can be completed within six months.	Complete the assessment of all HR Department classifications.

**Orange County Fire Authority**  
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Recommendation	Responsible Party	Timing	Benefit
<b>Recommendation #11:</b> Hire a Behavioral Health professional to relieve the Risk Manager of directly administering the program while continuing to support the WEFIT and Cancer Awareness programs with safety personnel, under the direction of the Risk Manager.	Risk Management Division	This effort will take nine months.	Relieve the Risk Manager of performing Behavioral Health duties and improve service delivery with professionally trained Behavioral Health staff.
<b>Recommendation #12:</b> Obtain security expertise for protecting facilities and provide the resources necessary to effectively perform the agency's security-related work. Transfer security responsibilities outside of HR.	Risk Manager, with support from Executive Management	This review will require 12 months to complete.	Enhance the quality of security protection services and relieve the Risk Manager of such duties.
<b>Recommendation #13:</b> Develop specific and measurable performance objectives for employee performance standards. Prepare an annual HR Department performance report that highlights the Department's accomplishments for the year.	HR Department	The development of specific and measurable performance objectives will require 12 months to complete.  The HR report shall be completed annually.	Enhance the quality of service delivery by creating accountability for HR employees.  The HR Department report will highlight the valuable contribution that the HR Department makes to OCFA.
<b>Recommendation #14:</b> Develop an employee recognition program for the HR Department employees, which can be variable as to frequency and type rather than just one annual award. Recognize and celebrate smaller, significant accomplishments, anniversaries, etc.	Proposed Organizational Development Division and HR Director	Program development will require six months to complete.	Increase the work productivity and morale of HR employees.

**Orange County Fire Authority**  
*Human Resources Service Level Assessment*

Recommendation	Responsible Party	Timing	Benefit
<b>Recommendation #15:</b> Create and implement a strategy for employing a workforce that reflects the community by: <ul style="list-style-type: none"> <li>◆ Assessing the workforce and labor market to establish a geographic marketing area for recruiting.</li> <li>◆ Designing an aggressive outreach plan that can realistically attract quality and diverse job applicants. This work should be performed in collaboration with management and the employee associations.</li> <li>◆ Creating an outreach recruitment team dedicated to marketing the OCFA as an employer of choice. Funds will be needed to support the recruitment efforts, and employee volunteers will be needed to attend recruitment events.</li> </ul>	Recruitment and Selection Division	It will take six months to develop an outreach recruitment program.	Enhance the quality of service delivery by OCFA through the employment of a more skilled and diverse workforce.
<b>Recommendation #16:</b> Develop a strategy and process to increase the completion rate of employee performance evaluations.	HR Director and Benefits Division	The development will require 12 months to complete.	Improve the work performance of OCFA employees.
<b>Recommendation #17:</b> Research and develop a plan to expand the use of NEOGOV Perform for all OCFA employees, including new performance evaluation forms, and commit resources for additional staff, if required.	Benefits Division	The expansion will require 12 months to complete.	Increase the efficiency and timely completion of employee performance evaluations. More accurately evaluate the performance of OCFA employees.
<b>Recommendation #18:</b> Develop a required employee performance evaluation training course for supervisors and managers, teaching supervisors and managers how to properly complete the performance evaluation and effectively communicate the ratings in the performance evaluation.	Proposed Organizational Development Division	The development and implementation of a new training course can be completed within 17 months.	Teach supervisors and managers how to correctly complete an employee performance evaluation. Enhance the quality of employee performance evaluations.
<b>Recommendation #19:</b> Develop accountability for completion of performance evaluations through the creation of a job performance standard for supervisors. Include the completion of performance evaluations as a factor in determining merit salary increases for supervisors.	Benefits Division with support from Executive Management	The implementation of this concept will require six months to complete.	Develop accountability for the proper completion of employee performance evaluations.

**Orange County Fire Authority**  
*Human Resources Service Level Assessment*

Recommendation	Responsible Party	Timing	Benefit
<b>Recommendation #20:</b> Demonstrate a strong commitment to the mission and vision of the HR Department by: <ul style="list-style-type: none"> <li>◆ Strengthening the HR Department's inclusion in major OCFA decisions.</li> <li>◆ Planning new OCFA programs or assignments in collaboration with the HR Department to minimize the time the HR Department spends operating in a reactionary mode.</li> <li>◆ Allowing the HR Department to operate within agency policies and values without interference outside of the chain of command and labor relations discussions.</li> <li>◆ Relying on the HR Department to provide sound and credible advice.</li> </ul>	Executive Management and HR Department	These steps can be supported immediately.	Improve the effectiveness of the HR Department. Upon receiving urgent requests, enhance the responsiveness of the HR Department.
<b>Recommendation #21:</b> Consider studying the transfer of major and sensitive alleged employee misconduct investigations from the Employee Relations Division to a new and separate unit that is accountable to and reports directly to the Fire Chief or a Deputy Chief.	Employee Relations Division	The study can be completed in 12 months.	Improve the efficiency in completing timely investigations.  Improve acceptance by employees of investigation results.
<b>Recommendation #22:</b> Reinstitute the Organization Development Division and place it under the HR Department. Allow the Division to: <ul style="list-style-type: none"> <li>◆ Perform a thorough study of the OCFA's professional training needs and desires.</li> <li>◆ Develop a comprehensive training program that supports employee professional development, leadership development, and succession planning.</li> </ul>	Executive Management and HR Director	Study of professional training needs can be completed within 12 months after funding is identified and prioritized.  Comprehensive training program development can be completed within 12 to 18 months.	Enhance employees' professional development and growth and prepare OCFA for future staffing and leadership needs.
<b>Recommendation #23:</b> Work with the IT Division within the Logistics Department to develop enhanced protection of employee personnel files so that data can be shared with Risk Management and third-party secure sites to complete required reports in a timely manner.	IT Division and Risk Manager	The initial discussion on this item can begin immediately.	Improve the efficiency in completing timely and accurate injured employee reports.



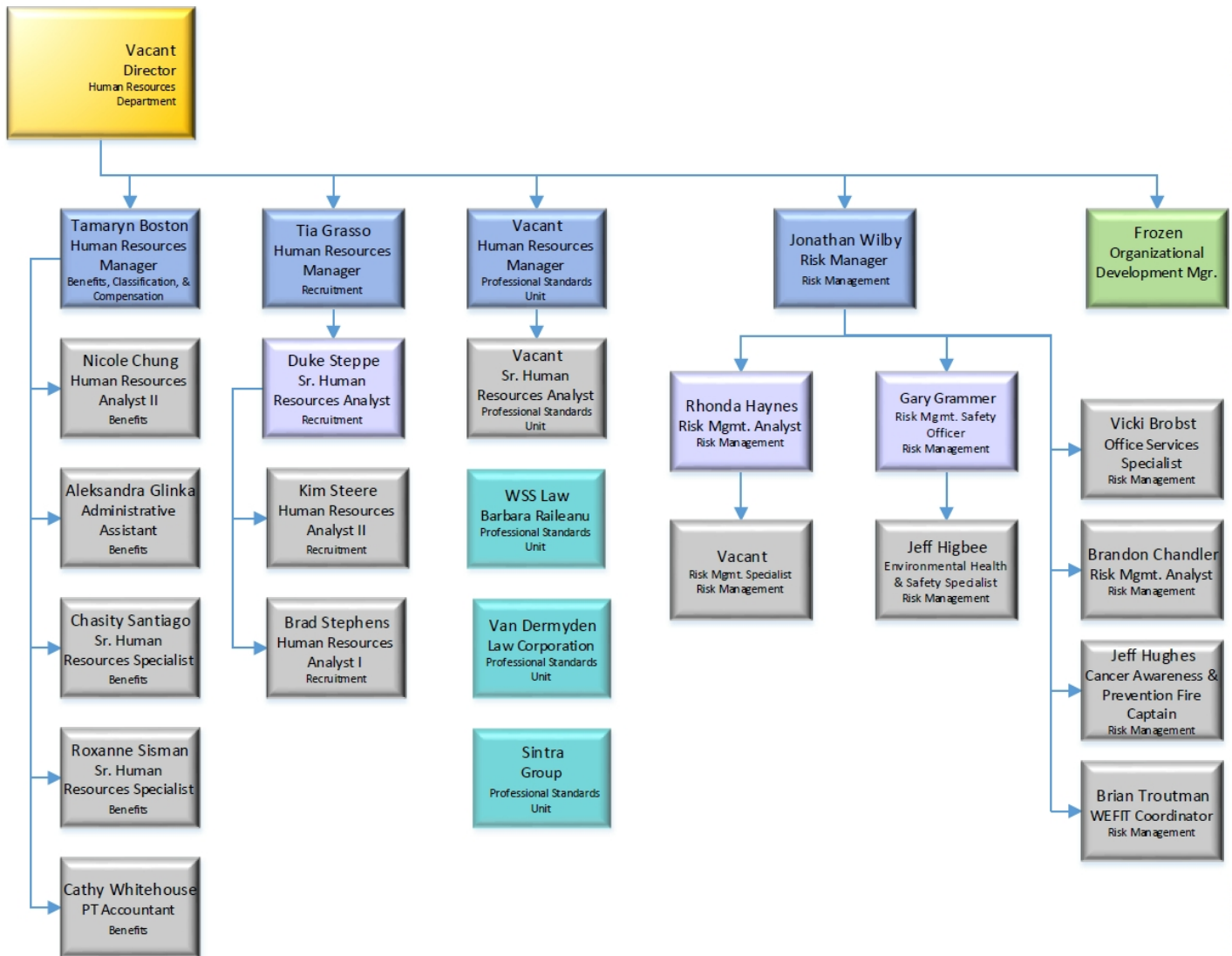
**Orange County Fire Authority**  
*Human Resources Service Level Assessment*

Recommendation	Responsible Party	Timing	Benefit
<b>Recommendation #24:</b> Research and implement an automated signature program that will electronically send documents under a secure system to internal parties required to sign any document.	IT Division and HR Director	Research and implementation will take six months.	Reduce the time required to sign and deliver important documents and improve the security of their delivery.
<b>Recommendation #25:</b> Support the July 2019 implementation of electronic employee time sheets for non-safety personnel.	Logistics Department, Finance Department, and affected Departments	Full implementation shall be completed by December 2019.	Reduce wasted time on completing time sheets and create a more accurate account of employees' work hours.
<b>Recommendation #26:</b> Study the feasibility of providing exam raters with tablet computers (e.g., iPads) to record exam performance, leading directly to more effectively tabulating scores and retaining examination records.	Recruitment and Selection Division and IT Division	The study and implementation can be completed within nine months.	Enhance the quality of evaluating job candidates and more accurately document those assessments.
<b>Recommendation #27:</b> Revise the office configuration to house the HR Director within the HR Department.	Executive Management and HR Director	Initiate discussion upon the arrival of the new HR Director.	Improve communications with HR staff and greater clarification of Department priorities. Improve employee morale.

## 6.1 PROPOSED STAFFING AND DRAFT PERFORMANCE MEASURES

The following is the HR Department organizational chart from **Section 2**, as a reference for the table that follows, which outlines proposed staffing and draft performance measures for each division within the HR Department.

**Figure 2—Existing OCFA HR Organization Chart**



May 2019

The proposed staffing and performance measures in the following table identify specific staff additions and/or changes that are recommended as a result of the information studied and interviews conducted for this assessment. The staff positions recommended represent Citygate's

**Orange County Fire Authority**  
*Human Resources Service Level Assessment*

evaluation of gaps and inefficiencies noted over the course of this assessment, as well as Citygate's estimates of what is needed to move OCFA forward.

**Table 2—Proposed HR Department Staffing and Performance Measures**

<b>HR Division</b>	<b>Staff Positions</b>	<b>Performance/Workload Measures to Initiate</b>
Benefits, Classification, and Compensation	Citygate recommends NEOGOV Perform be implemented for OCEA and sworn fire employees. Add 1.0 FTE HR Specialist to implement this program organization-wide.	Currently 67 percent of employee performance evaluations (EPE) are completed on a timely basis. After the EPE training is completed (see Organizational Development row at bottom of table), it is recommended that OCFA set a goal of achieving an 85 percent rate of completion within 12 months and 100 percent within two years, to be maintained thereafter.
Recruitment: Selection and Exams	A third Analyst has recently been added. There is a need to separate selection and exams from recruitment activities to allow three Analysts to focus only on selection and exams. This Division needs 0.5 FTE administrative support.	Recruitment and Selection completed 140 selections/examination processes in last two years. This represents roughly 70 processes per Analyst (two Analysts), or 35 each per year over that period. It is more reasonable to expect 25 per Analyst per year. With three Analysts, it is anticipated 75 total processes per year could be completed.
Recruitment: Outreach Recruitment	Add 1.0 FTE Recruitment Officer position to focus on outreach recruitment strategy. This section needs 0.5 FTE administrative support.	Instead of the current five outreach efforts per month, set a standard of 12 to 15 per month, accomplishing 120 to 150 outreach efforts per year (over a 10-month recruitment period).
Professional Standards Unit (Employee Relations)	This Division needs 1.0 FTE administrative support.	No applicable workload/performance measures.
Risk Management	Add one in-house Behavioral Health professional to relieve the Risk Manager of directly administering the Behavioral Health program. Retain WEFIT and Cancer Prevention Awareness under Risk Manager. Add contracted technical support for IT and facilities emergency/security planning and breach prevention. Transfer security-related responsibilities outside of HR. This Division needs 1.0 FTE administrative support.	No applicable workload/performance measures.

**Orange County Fire Authority**  
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HR Division	Staff Positions	Performance/Workload Measures to Initiate
Organizational Development	Re-instate the Division to oversee training for employee performance evaluations and ensure development of a comprehensive training program supporting employee professional development, leadership development, and succession planning. Add 1.0 FTE Division Manager. This Division needs 1.0 FTE administrative support.	There are about 375 managers and supervisors giving evaluations, currently with no training. About 140 of these are Battalion Chiefs. Undertake a year-long program to provide training for giving employee evaluations. About 18 classes over 11 months, 20 persons per class, will accomplish this goal.

These recommendations result in the following new staff positions:

- ◆ One HR Specialist to Benefits, Classification, and Compensation (for NEOGOV organization-wide)
- ◆ One Analyst-level position (Recruitment Officer) who answers to current Recruitment and Selection Manager
- ◆ One HR management position to Organizational Development
- ◆ One to four administrative support personnel:
  - Recommendations include adding up to four additional administrative support personnel, depending upon the actual support workloads once the HR Department has been brought up to date with current technology and business practices.
  - Proceed first by hiring one (possibly two) administrative support personnel and assign to the division(s) with most need for administrative support. Later, once technical/operational barriers to efficiency have been removed, evaluate need for additional administrative support.

These recommendations also result in adding:

- ◆ One in-house and/or contracted Behavioral Health professional to relieve the Risk Manager of directly administering the Behavioral Health program.
- ◆ Contracted technical support for facilities emergency/security planning and breach prevention and transferring the function outside of the HR Department.

## **6.2 STRATEGIC ONGOING BEST PRACTICES AND METRICS**

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This section covers best practices for governing documents and/or metrics guiding the activities of a first-class HR department. This section expands upon the near-term SLA recommendations to include permanent strategies for:

- ◆ How OCFA determines its position amongst agencies competing for talent
- ◆ How OCFA establishes the scope and type of job classifications it is going to employ
- ◆ How OCFA onboards its new employees
- ◆ How OCFA selects new talent
- ◆ What type of ongoing training and career succession planning OCFA offers to its workforce
- ◆ How OCFA builds relationships among the various departments within the organization.

Within the following outline, presented by each responsible HR Department division, are eight strategies for the establishment of governing documents and/or metrics that will help OCFA reach high standards for competing for talent, establishing job classifications, helping its new employees enter into the OCFA mission, selecting the best and the brightest, and ensuring a strong workforce into the future. The list is foundational to good, modern HR practices and should become integral to OCFA's *strategic* operations in the future.

### **6.2.1 Benefits Division**

#### **1) Classification Specifications**

- ◆ Assess the existing status of all classification specifications.
- ◆ Determine which classification specifications require an update or revision, including which classifications take priority to complete.
- ◆ Evaluate which classifications can be studied in-house and which classifications will require study by an outside consultant.
- ◆ Develop a comprehensive schedule to study the classification specifications.
- ◆ Create a permanent rotating schedule for evaluating classification specifications that ensures that they remain updated.

Completion of the initial assessment of classification specifications and development of a comprehensive schedule can be completed within six months. Complete all classification specifications studies within three to five years.

**2) *Salary Surveys***

- ◆ Review the salary history of all classifications. Assess the current salary survey agencies to determine if any update or revision is needed.
- ◆ Develop a strategy regarding OCFA's desired placement within its survey agencies, specifically how high a ranking OCFA wishes to be placed.
- ◆ Determine how often salaries shall be reviewed, which salary surveys can be completed by OCFA HR staff, and which shall be contracted out. Create a master schedule for conducting salary surveys.

Completion of the initial review of salary history can be accomplished in six months. Development of a master plan for the salary surveys can be completed within 12 months. Completion of salary surveys on all classifications can be accomplished within three years.

**3) *Onboarding***

Every new OCFA employee requires data processing to become employed with OCFA. It is the goal of OCFA to complete all the data processing before the employee starts work. A performance measure is to complete the onboarding of new employees before they start work 100 percent of the time.

**6.2.2 Recruitment and Selection Division**

**4) *Outreach Recruitment Plan***

To employ a workforce that reflects the community it serves, OCFA needs to create a comprehensive outreach recruitment plan. The plan will increase the diversity and enhance the quality of job candidates. The plan will make OCFA an employer of choice.

An outreach recruitment plan can be developed within six months.

**6.2.3 Organizational Development Division**

**5) *Succession Plan***

Much of the future success of the OCFA will depend on the quality of its leadership. An effective succession plan prepares an organization for the future through the development and growth of future leaders in the organization.

A strong succession plan requires a review of the workforce, an analysis of projected employee turnover, and organizational growth. It also assesses the professional development of existing

employees and identifies employees with potential leadership qualities. These employees are given to opportunity to further develop skills through assignments, projects, formal training, and mentoring.

An assessment of the organization, an analysis of the workforce, and identification of potential leaders will take nine months to complete. The development of a succession plan will take additional nine months.

#### **6) *Leadership Academy***

A critical component of a successful succession plan is to train employees to become effective and productive supervisors.

- ◆ Create a leadership academy to help OCFA staff transition from staff or technical positions to a supervisory role.

A leadership academy will consist of a series of training classes on multiple supervisory and leadership topics conducted within a 9- to 12-month period.

- ◆ Hire professional trainers and use in-house leadership staff to conduct the training.

The development of an academy will take 12 months.

#### **7) *Training Needs***

A thorough assessment of the training needs of an organization requires surveys of services and skills needed by departments and a survey of employees' skills and abilities. The key is to match the skills an organization needs to deliver services with the skills and abilities of its workforce.

It is estimated that completing a survey of each Department's skills needed would take six months. Completion of a survey of employees' skills and abilities can be accomplished within six months.

### **6.2.4 Employee Relations Division**

#### **8) *Meetings with Employee Associations***

To develop and maintain a collaborative and productive working relationship, the HR Department must consistently reach out the employee associations in good faith to discuss labor and employee relations issues.

There is a need to create a master calendar with pre-established meet-and-confer dates with all employee associations. Additional meet-and-confer meetings with employee associations will occur as unplanned issues arise.

The creation of a master meeting schedule with employee associations is estimated to take six months.





# HUMAN RESOURCES SERVICE LEVEL ASSESSMENT

## ORANGE COUNTY FIRE AUTHORITY

PRESENTED ON SEPTEMBER 17, 2019

# Background

- This Service Level Assessment (SLA) is one of several such SLAs being conducted by Citygate Associates
- The Human Resources Review is a section of the overall Executive Management SLA

# Methodology of the HR SLA

- Interviews
  - Executive Management
  - Human Resources staff (primary focus)
  - Employee Association representatives
  - As needed other support departments
- Review of multiple documents
  - Standard Operating Procedures (SOP)
  - Four employee labor agreements (MOUs)
  - HR policies and procedures
  - HR Board of Directors Resolutions
  - Staff reports to the Board on various HR issues
  - Other related documents

# Human Resources Department Functions and Services

- Organization Structure
  - Four Divisions
  - Staff – 22 full-time employees (FTE), plus 2 contract attorneys
- Recruitment and Selection Division
  - Merit-based system
  - Selection and examination processes
  - Completed 140 examination processes over past 2 years
  - Attend 5 recruitment activities per month
  - Conduct pre-employment medical examinations

# Human Resources Department Functions and Services (cont.)

- Benefits Division
  - Classification and compensation activities and studies
  - Administer employee benefits for non-safety employees and retirees
  - Process new employee onboarding with automated system
  - Administer employee performance evaluations
- Employee Relations Division (Professional Standards Unit)
  - Maintain positive employee relations with employee associations
  - Interpret MOU agreements as requested
  - Handle grievances and employee discipline



# Human Resources Department Functions and Services (cont.)

- Risk Management Division
  - Workers' Compensation Program
  - Liability and Insurance Programs
  - Security of OCFA facilities
  - Employee Wellness Programs
    1. Behavioral Health Program – 841 counseling sessions
    2. WEFIT Program – 648 wellness exams
    3. Cancer Prevention Awareness Program

# Important Positioning Objectives

1. Becoming a strategic partner
2. Improving organizational support
3. Achieving recognition as OCFA being an employer of choice



# Important Positioning Objectives (cont.)

## 1. Becoming a strategic partner

### Challenges

- HR has little influence or input in major organizational decisions
- HR is routinely in an overwork crisis mode
- HR is given additional responsibilities with little or no input
- Lack of advanced planning

### Recommendations

- Strengthen the HR Department's inclusion in major OCFA decisions
- Plan new programs or assignments in collaboration with HR
- Allow HR to operate within agency policies and values without outside interference
- Rely on HR for sound and credible advice

# Important Positioning Objectives (cont.)

## 2. Improving organizational support

### Challenges

- Imbalance in distribution of staff
- Minimal clerical support, i.e., managers and analysts perform clerical duties
- HR staff given additional responsibilities with little additional support
  - Behavioral Health Program
  - Facilities security responsibilities
- Lack of a formal policies and procedures manual
  - Multiple HR-related documents are found in different sources
  - Some HR practices are administered without written policies and procedures

# Important Positioning Objectives (cont.)

## 2. Improving organizational support (cont.)

### Recommendations

- Create a concise HR mission statement
- Develop a systematic method of identifying, evaluating, and addressing HR Department issues
- Determine the staffing necessary to meet HR service demands
- Develop specific and measurable performance objectives and standards
- Obtain facilities security expertise via outside contract
- Develop a comprehensive HR policies and procedures manual

# Important Positioning Objectives (cont.)

## 3. Achieving recognition as an employer of choice

### Challenge

- Current OCFA workforce composition does not reflect the community that it serves

### Recommendations

- Recruitment and hiring of the best and most diverse candidates
  - Create Recruitment Officer position
  - Develop an outreach recruitment plan
- Testing job candidates
  - Ensure exam processes are job-related
  - Review the 80% passing score practice
  - Closely monitor potential adverse impact

# Important Positioning Objectives (cont.)

## 3. Achieving recognition as an employer of choice (cont.)

### Recommendations (cont.)

- Classification and compensation studies
  - Develop a strategy to complete classification and compensation studies
  - Develop a policy on salary ranking within its comparable labor market
- Organizational Development
  - Create a new Organizational Development Division
  - Support employee professional development
  - Assess organization training needs
  - Develop training programs and succession planning

# Recommendations Plan

- Recommendations Plan includes 27 specific recommendations
- Components of recommendations:
  - Recommendation
  - Responsible party
  - Timeline
  - Benefit
- These recommendations will be inputs to the 2020 Strategic Plan when the SLAs are completed

# Recommendations Themes

- Operations, practices, and resources
- Foundation, structure, and planning
- Outreach recruitment efforts and diversity
- Employee performance evaluations
- Human Resources as a strategic partner
- Enhance training and employee development
- Embrace technology to enhance service delivery
- Consider relocating the office of the Director of Human Resources



# Proposed Human Resources Staffing

## Benefits Division

- Staff needed: 1.0 FTE Human Resources Specialist
  - To implement the automation of all employee performance evaluations

## Recruitment and Selection Division

- Staff needed: 1.0 FTE Recruitment Officer and 1.0 FTE Administrative Assistant (split equally between exams and recruitment)
  - To develop an outreach recruitment plan (Employer of Choice)
  - To provide administrative support in examination administration

# Proposed Human Resources Staffing

## Employee Relations Division

- Staff needed: 1.0 FTE Administrative Assistant
  - To provide administrative support to the Employee Relations Division

## Risk Management Division

- Staff needed: 1.0 FTE Behavioral Health Professional
  - To assist with the management of the Behavioral Health Program
- Staff needed: 1.0 FTE Administrative Assistant
  - To provide administrative support to the Risk Management Division
- Facilities emergency/security planning and breach prevention
  - Contract out services and transfer the function

# Proposed Human Resources Staffing (cont.)

## Organizational Development Division (Proposed)

- Staff needed: 1.0 FTE Organizational Development Manager and 1.0 FTE Administrative Assistant
  - To oversee and manage the proposed Organizational Development Division

# Strategic Ongoing Best Practices and Metrics

- Develop a classification and compensation strategy and plan
- Fully implement automated onboarding process
- Develop an outreach recruitment plan (Employer of Choice)
- Create a succession plan to develop future OCFA leaders
- Develop a Leadership Training Academy to teach employees supervisory skills
- Conduct an internal assessment of services required and skills needed to deliver services
  - Develop training programs for needed skills
- Develop and maintain a collaborative and productive working relationship with employee associations

**Questions/Comments?**



**Orange County Fire Authority**  
**AGENDA STAFF REPORT**

**Human Resources Committee Meeting**  
**September 17, 2019**

**Agenda Item No. 4B**  
**Discussion Calendar**

**Contract Adjustment**  
**Third Party Workers' Compensation Administration**

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**Contact(s) for Further Information**

Lori Zeller, Deputy Chief  
Administration & Support Bureau

[lorizeller@ocfa.org](mailto:lorizeller@ocfa.org)

714.573.6022

Jonathan Wilby, Risk Manager  
Human Resources

[jonathanwilby@ocfa.org](mailto:jonathanwilby@ocfa.org)

714.573.6832

**Summary**

This agenda item is submitted for approval to increase the contract with CorVel Corporation (CorVel) to add an additional claims adjuster for the administration of the OCFA's Workers' Compensation (WC) Program.

**Prior Board/Committee Action**

At its March 27, 2014, meeting, the Executive Committee approved awarding a contract to CorVel for WC Third Party Administration and managed care services for an initial term of five years and three additional one-year contract extensions.

At its May 7, 2019, meeting, Risk Management staff requested approval to adjust the contract with CorVel to add an additional claims adjuster for the administration of the WC Program. The Human Resources Committee directed staff to request additional information from CorVel regarding its ability to provide additional services at no cost, current caseload per adjuster data, and projected caseload impacts with the addition of Garden Grove as an OCFA member city. The questions asked of CorVel as a result of this direction are provided as Attachment 1 and CorVel's responses are provided in Attachment 2.

**RECOMMENDED ACTION(S)**

Review the proposed agenda item and direct staff to place the item on the agenda for the Executive Committee meeting of September 26, 2019, with the Human Resources Committee's recommendation that the Executive Committee approve and authorize the Purchasing Manager to increase the Professional Services Agreement with CorVel for Workers' Compensation Third Party Administration for the remaining three years of the contract, at an annual increase of \$71,250 for 2019/20 (partial year) and \$95,000 per year for 2020/21 and 2021/22.

**Impact to Cities/County**

Not Applicable.

**Fiscal Impact**

Funding for the WC Program is included in the adopted FY 2019/20 General Fund Budget, specifically in the Human Resources budget for services and supplies (S&S). The Human Resources S&S budget was increased for FY 2019/20 to account for impacts related to the addition

of Garden Grove, and those S&S expenditure increases are funded by the corresponding cash contract revenue increase from the addition of Garden Grove.

## Background

### ***Workers' Compensation Third Party Administration (TPA)***

CorVel was selected as the TPA of our self-insured WC Program through a competitive solicitation process in 2014 with an initial contract term of five years and three additional one-year extensions. CorVel's initial proposal included six team members (five adjusters and one supervisor) based on 775 open claims at the time of transitioning from the previous TPA. Currently, there are 964 open claims, which is a 24% increase, due to an: increase in employees (14% increase in authorized positions since 2014); increase in overtime; aging workforce; increase in presumptive claims; and changes to workers' compensation legislation including the statute of limitations for filing cancer claims. CorVel recognized the need for additional team members and increased staffing to a claims team of eight (seven adjusters and one supervisor) over the past five years at no added cost to the OCFA.

Staff requested additional information from CorVel as directed by the Human Resources Committee (Attachments 1 and 2). Based on its response, staff is requesting support for a contract increase of \$95,000/year to the remaining three years of the contract which will be used to fund an additional adjuster (with the first year prorated at \$71,250 to reflect a partial year). An additional adjuster will accommodate the current claims volume, allow absorption of any additional claims that may result with the addition of Garden Grove, meet caseload guidelines set by the California State Association of Counties Excess Insurance Authority, improve customer service, and may reduce open claims volume. ***Good customer service and frequent communications are highly important factors in taking good care of our people and key to maintaining our low litigation rate.***

The table below provides CorVel's claims administration pricing for the past five years and the three additional years with the proposed addition of CorVel TPA support staff.

Year	Contract Period	Administration Fees per Contract (Priced at staffing of 6, currently staffed w/8)	Increase per Contract	Requested Increase for One Adjuster (Cost to increase staffing from 8 to 9)	Administration Fees per Proposed Contract	Increase per Proposed Contract
1	14/15	528,752	---			
2	15/16	544,614	3%			
3	16/17	560,952	3%			
4	17/18	572,171	2%			
5	18/19	583,614	2%			
6	19/20	595,286	2%	71,250 (prorated)	666,536	14.2%
7	20/21	601,238	1%	95,000	696,238	4.4%
8	21/22	607,250	1%	95,000	702,250	1%

Based on CorVel's response to the questions, Risk Management staff is recommending approval of an increase of \$95,000/year (with the first year prorated at \$71,250 to reflect a partial year) to the administrative fees for the remaining three years of the contract.

### ***Attachment(s)***

1. OCFA Questions Submitted to CorVel
2. CorVel Response to OCFA Questions





# ORANGE COUNTY FIRE AUTHORITY

P. O. Box 57115, Irvine, CA 92619-7115 • 1 Fire Authority Road, Irvine, CA 92602-0125

Brian Fennessy Fire Chief

(714) 573-6000

[www.ocfa.org](http://www.ocfa.org)

June 4, 2019

**Via Electronic Mail**

CorVel Enterprise Comp  
Attn: Bryan Piattoni  
1100 Town & Country Road Ste 400  
Orange, CA 92868  
[bryan\\_piattoni@corvel.com](mailto:bryan_piattoni@corvel.com)

**Re: Request for Information Regarding the Current Contract and Services  
Provided to Orange County Fire Authority**

Dear Mr. Piattoni:

OCFA is requesting information from CorVel on the current Third Party Workers' Compensation Administration (TPA) for claims and services provided under the current contract and the impacts that the addition of Garden Grove may have on service levels.

Please e-mail your response to the attached questions on or before **June 19, 2019 at 11:00 a.m.** If you have any questions please feel free to contact me at 714-573-6641 or via e-mail at: [debbiecasper@ocfa.org](mailto:debbiecasper@ocfa.org).

Regards,

Debbie Casper, C.P.M., CPPB  
Purchasing Manager

cc: David Kendig, General Counsel  
Lori Zeller, Deputy Chief, Admin. & Support Bureau  
Jonathan Wilby, Risk Manager  
Rhonda Haynes, Workers' Compensation Program Manager



## THIRD PARTY WORKERS' COMPENSATION ADMINISTRATION

### QUESTIONS

Please submit your response to this request via e-mail to [debbiecasper@ocfa.org](mailto:debbiecasper@ocfa.org) on or before **June 19, 2019 at 11:00 a.m.**

OCFA is requesting additional information as it relates to the Third Party Workers' Compensation (TPA) administrative services provided to OCFA and the impact, if any, the addition of Garden Grove workers' compensation claims will have on the current services provided by CorVel.

1. Please provide details on the current staffing structure and staffing costs of providing TPA administration for OCFA.
2. What is the current OCFA claims count and staffing level of each Adjuster handling OCFA claims and what is the caseload statutory requirement?
3. Based on the review of Garden Grove claims loss experience, explain how many additional claims per month CorVel anticipates, and how the additional claims may impact the existing staff that handles claims for OCFA.
4. Do you feel your current staff is equipped to handle the additional claims anticipated with the addition of Garden Grove? If not, based on the anticipated increase in claims, how many claims adjusters do you think will be necessary to handle the added volume? Please provide justification.
5. OCFA is requesting that CorVel provide additional claims adjusters, if required, without an increased cost to OCFA for the remaining three years of the contract. OCFA is also requesting assurance that there would be no negative impact to the current services provided by CorVel. Please provide a response. If there are any concerns that there may be an impact to current services, please provide details on what the impacts may be.
6. If CorVel is unable to provide the added claims adjuster(s) without a price increase to OCFA, provide the cost of each new adjuster and the benefit that OCFA will realize from the additional staff.
7. Provide any additional information that you would like OCFA to consider.

If you have any questions please contact me by email or via telephone at 714-573-6641.

Regards,

Debbie Casper, C.P.M., CPPB  
Purchasing Manager

**Response from Corvel to OCFA  
Request for Information, June 2019**

**1. Please provide details on the current staffing structure and staffing costs of providing TPA administration for OCFA.**

**Answer:** Currently, there are 5 Indemnity Adjusters, 1 Future Medical Adjuster, 1 Medical Only Adjuster, and 1 Supervisor assigned to the OCFA. This team currently handles 964 open OCFA files. The OCFA currently pays \$595,286/year for staffing.

**2. What is the current OCFA claims count and staffing level of each Adjuster handling OCFA claims and what is the caseload statutory requirement?**

**Answer:** There is no legal requirement for open claim count. The OCFA's excess carrier, CSAC-EIA, has guidelines which require caseloads of 150 files per adjuster. For more effective claims handling and customer service, CorVel recommends a caseload of no more than 120 files per indemnity adjuster. Please see below for current staffing and caseloads.

Adjuster	Indemnity	Future Medical	Medical Only	Grand Total	Position
Crockett, Julie	105	42	0	147	Indemnity Adjuster
Le, Annie	89	55	0	144	Indemnity Adjuster
McKee, Gwen	122	32	0	154	Indemnity Adjuster
Wagar, Judy	96	50	0	146	Indemnity Adjuster
Temporary Adjuster	122	27	0	149	Indemnity Adjuster
Lynch, Ruth	0	185	0	185	Future Med Adjuster
Rodriguez, Olga	0	0	39	39	Medical Only Adjuster
<b>Grand Total</b>	<b>534</b>	<b>391</b>	<b>39</b>	<b>964</b>	
Chanty Arroyo	0	0	0	0	Supervisor

**8 total staff**

*Avg cases per  
148 Indemnity Adjuster*

The grid below is the recommended staffing needed to bring the caseloads within the recommended caseload range.

Adjuster	Indemnity	Future Medical	Medical Only	Grand Total	Position
Crockett, Julie	105	20	0	125	Indemnity Adjuster
Le, Annie	89	25	0	114	Indemnity Adjuster
McKee, Gwen	122	0	0	122	Indemnity Adjuster
Wagar, Judy	96	25	0	121	Indemnity Adjuster
Robin Kwolek	122	0	0	122	Indemnity Adjuster
Additional Staff	0	136	0	136	Additional Staff
Lynch, Ruth	0	185	0	185	Future Med Adjuster
Rodriguez, Olga	0	0	39	39	Medical Only Adjuster
<b>Grand Total</b>	<b>534</b>	<b>391</b>	<b>39</b>	<b>964</b>	
Chanty Arroyo	0	0	0	0	Supervisor

**9 total staff**

*Avg cases per  
123 Indemnity Adjuster*

**Response from CorVel to OCFA  
Request for Information, June 2019**

- 3. Based on the review of Garden Grove claims loss experience, explain how many additional claims per month CorVel anticipates, and how the additional claims may impact the existing staff that handles claims for OCFA.**

**Answer:** Based on our analysis of the historical loss runs and our experience with clients who bring on new entities and agencies, CorVel expects 2-4 claims per month with the addition of the Garden Grove stations. The additional claims could cause the caseloads to exceed the standard set by OCFA's excess carrier. In addition, it could potentially create delays in the extension of benefits and decreased overall customer service.

- 4. Do you feel your current staff is equipped to handle the additional claims anticipated with the addition of Garden Grove? If not, based on the anticipated increase in claims, how many adjusters do you think will be necessary to handle the added volume? Please provide justification.**

**Answer:** Due to the requirements of the OCFA's excess carrier, we do not feel the staff is equipped to handle the additional claims anticipated from Garden Grove without exceeding the caseload requirements. In addition, CorVel recommends caseloads of no more than 120 files per adjuster in order to meet the additional service staffing needed for Garden Grove.

See the recommended staffing grid above which would yield an average of 123 open claims per Indemnity Adjuster.

- 5. OCFA is requesting that CorVel provide additional claims adjusters, if required, without an increase in cost to OCFA for the remaining three years of the contract. OCFA is also requesting assurance that there would be no negative impact to the current services provided by CorVel. Please provide a response. If there are any concerns that there may be an impact to current services, please provide details on what the impacts would be.**

**Answer:** Based on the caseload and expected claim volume CorVel was given in the RFP issued in 2014, CorVel priced for a team of 6. CorVel's original staffing was based on the claims volume presented by the prior TPA listed in the RFP, however, over 120 additional files were received after CorVel took over the claims. Also, the OCFA new claims volume has risen more than 27% since 2014. In 2015 and 2017, CorVel increased it's staffing in response to the increased claims volume with no additional cost to the OCFA. See the chart below. Any further increase in claims volume could negatively impact claims handling, audit results, as well as customer service.

	Anticipated per 2014 RFP Data	FY 2014/2015	FY 2015/2016	FY 2016/2017	FY 2017/2018	FY 2018/2019
Total staff assigned to OCFA	6	6	7	7	8	8
New Claim Volume	360	368	399	451	493	420
Open Claims as of the last day of the period	763	749	745	866	942	964

**Response from Corvel to OCFA  
Request for Information, June 2019**

- 6. If CorVel is unable to provide the added claims adjuster(s) without a price increase to OCFA, provide the cost of each new adjuster and the benefit that OCFA will realize from the additional staff.**

**Answer:** CorVel is seeking \$95,000/year to increase the current staffing level to 9, which is 3 adjusters above what was originally priced for. With this annual fee adjustment CorVel will revise the staffing model to include a single supervisor, 5 Indemnity Adjusters, 1 Future Medical Adjuster, 1 Medical Only Adjuster, and one additional senior level adjuster. See below.

Original Staffing Priced for:	Proposed Staffing Adjustment:
1 Claims Supervisor	1 Claim Supervisor
4 Indemnity Adjusters	5 Indemnity Adjusters
.5 MO Adjuster	1 MO Adjuster
.5 FM Adjuster	1 FM Adjuster
	1 Additional Staffing

- 7. Provide any additional information that you would like OCFA to consider.**

**Answer:** Despite a 27% increase in claims volume from what was initially expected, CorVel has continued to meet the OCFA's service needs by adding to staff without increasing our annual administration fee.

CorVel is proposing an adjustment in our annual fee in order to enhance the team currently serving the OCFA. With the proposed staffing level of 9 team members, CorVel believes that it can absorb the additional claims from Garden Grove successfully.

It is our pleasure to work with such a preeminent employer as the Orange County Fire Authority. We look forward to many years of partnership to come.