

REVENUE BUREAU LABOR-MANAGEMENT COMMITTEE
November 13, 2013

Attendance:	Din Belderrain, Kathleen Butler, Stephen Bouffard, Frank Dufay, Karla Frahler, Kathy Goss, Mary Beth Henry, Thomas Lannom, Scott Karter, Karen Obana, Julie Shervey, Terri Williams
Facilitator:	Joe Hertzberg
Note Taker:	Meghann Fertal
Handout Distributed:	LMC Retreat Agenda; Framework for Citywide Labor-Management Committee; Revenue Bureau Governance Revised September 24, 2011; Sample Ground Rules used by LMC; Suggested Future Issues for LMC to Address; BDS Policy: Non-Management Employees on Interview Panels; LMBAC Budget Values and Guidelines; Principles, Constraints, Considerations for Office Moves June 2012; Hiring Practices for Represented Employees January 2009

Knowing one another better as people

- Structured small talk – partnered chat, one labor and one management

Understanding Labor and Management

- What are your highest goals for the Revenue Bureau and / or City?
 - Shared:
 - Transparency
 - Training
 - Efficiencies
 - Better customer service
 - Other items brought up:
 - Job shadowing (Labor)
 - Building bridges with division / intersections within divisions (Labor)
 - Professionalism (Management)
 - Integrity (Management)
 - Diverse organization / equity approach and lens (Management)
 - Decision delegations / empowerment (Management)
 - Positive and fun work environment (Management)
 - Partnership and leadership (Management)
 - Recognized government bureau as authority (Management)
 - No inconsistencies or disagreements
- What are some important values that you believe we share?
 - Shared:
 - Excellent, efficient and quality customer service and focus
 - Health, wellness, family / work life balance
 - Public service, access to services, and equity
 - Other items brought up:
 - Modeled desired behaviors – leading by example (Management)
 - Respectful of co-workers (Management)
 - No inconsistencies or disagreements

- What could Labor do to strengthen Labor-Management collaboration in the Bureau?
 - Management:
 - Trust
 - Two-way street
 - Candid conversations
 - Communicate
 - Understanding constraints
 - Resources are not unlimited and have constraints and limitations
 - Prioritization – work needs to get done in a timely manner and in the best possible way
 - LMC can help prioritize some focuses (BLIS, REGIS, phone calls, etc)
 - Labor:
 - Be supportive of bureau’s mission
 - Be constructive in approach
 - Speak up, communicate (within a safe environment)
- What could Management do to strengthen Labor-Management collaboration in the Bureau?
 - Management:
 - Request help and input
 - Being active in signaling in earlier involvement and decision process
 - Trust
 - Create environment that is safe to be honest
 - Encourage curiosity
 - Communicate constraints
 - Labor:
 - Recognize the individual and adapt to individual’s needs
 - Manage to each individual’s style not use one-set management style
 - Empowerment / not micro-manage
 - Complete the circle
 - Beginning: LMC, fruitful exchange of ideas
 - End: tangible follow through (giving credibility to process)
 - Ex.: Annual survey
 - Start: Survey itself
 - Middle: Progress report
 - End: Address items with solutions
- What is one important fact you would like the other caucus to know about your caucus?
 - Labor:
 - There is a lot of frustration all around
 - Communication
 - Within and between caucuses

- People (the majority) want to do a good job
 - Management:
 - We have more in common with Labor than different
 - Other brainstorming ideas:
 - We care
 - We value the collaboration
 - We are in this together
 - Managers have flaws
 - Both caucuses are responsible for the work environment
- Ask a question of the other caucus:
 - Labor:
 - Safer environment to ask questions
 - Trust building happens over time – it is result based, evidence of follow-through
 - Management:
 - Why are you on and a part of the LMC?
 - Individualized / rhetorical question
 - Around the room discussion
 - Why are non-represented / non-management co-workers not included in the Revenue Bureau LMC?
 - Benefit of being represented – organized labor
 - Add to December 17th Agenda

LMC Basics

- Function and purpose of LMCs
 - Recognition that all participants are peers
 - No discrimination, recriminations, and repercussions will come from something said or discussed within LMC
 - LMC is a tool for collaboration between labor and management
- What we would like to see:
 - Continuity of membership
 - Would like to see accomplishments
 - Detailed-oriented behaviors, such as completing the circle, careful analysis of documents, and constructive feedback and suggestions to be applied in committee as they are in day-to-day work life
- What did we learn from other LMCs
 - Labor:
 - It is difficult to correspond with other labor members within OMF and City
 - Revealing that there isn't a precedent for concerted effort to network for the labor side of LMCs within OMF and City
 - Observation: management is able to coordinate LMC related issues more often than labor due to more frequent meetings

Key Issues

- Budget Values and Guideline (LMBAC) 12/08/10:
 - Management has suggested adding a qualifier to the preamble
 - A recognition that these are not absolutes
 - Qualifier: “Whenever possible and in compliance with City budget direction”
 - Make the list that shows the broader affirmative/proactive advocacy of values rather than negative absolutes
 - Seek to have the smallest budget possible, to keep in-line with use of public \$
 - Sub-committee to edit and bring back to December 12 meeting
 - Karen Obana **Point person to set meetings and report back
 - Scott Karter
 - If anyone has suggestions further e-mail Karen and Scott
 - ADD ITEM TO DEC 17 AGENDA
 - Stabilization budget for General Fund Bureaus
 - Business Solutions Division is funded by the Water Bureau who will be experiencing budget cuts
 - Request the addition of Senior Management Analyst position
 - Labor has requested to know the budget impact of this appointment
 - No budget impact since being funded from vacancy savings
 - There is a funding request to the Mayor’s Innovation Fund
 - If the Mayor chooses our request, IRS Tax Return Sharing, then this is how the position will be funded in the current fiscal year
 - Labor has requested that more detail and clarity about source of funding, position hiring, and budgetary impacts of placement decisions (such as this position decision)
 - Looking at adding positions within the Regulatory Division, funded by the permit payers
 - Thomas, will request and advocate at OMF Leadership Team retreat next week that the Revenue LMBAC be re-instated
- All-Bureau survey:
 - Broad-based survey, ranked questions have not changed
 - Response rate is consistent with prior years
 - Bureau-level every category has improved since 2012
 - Tax and Regulatory Divisions have had substantial improvements from prior years
 - Joe requested information about why Regulatory’s number bumped
 - Regulatory, resource challenge in 2012, there has been a morale uplift with more staffing in 2013
 - Thomas looks to the survey as trends and broad ‘health’ of the bureau

- Redactions – there have been very few, specifically names and negative comments
 - ADD TO DEC 17 AGENDA
 - Meghann to get # of respondents v. # within the bureau for each year
 - Homework – look at comments with the following:
 - Themes
 - Response
 - What actions can be taken
- Future LMC topics – brainstorming session:
 - Training
 - Trainer transition
 - Each division / department have their own transitions
 - New employee orientation
 - A “check-in”
 - Clearly identify what a “check-in” is
 - Job policy / procedure – knowledge bank
 - Satisfaction Survey
 - Comments portion
 - Bureau business plan
 - Management would like to see heavy stakeholder feedback
 - Tie-in to OMF Strategic Plan
 - OMF Succession Plan
 - Communication and outreach
 - Educating each caucus
 - All-staff topic
 - Mayor’s Comprehensive OMF Review
 - May 2015 office move
 - Budget
 - Equitable advancement opportunity
 - Specifically Customer Account Specialist I
 - Professional development
 - How to improve their skill set, their division, their bureau
 - Non-reps participation in LMC
 - Completing the Circle
 - Finance Plan – cash handling policy
 - Peer Award: Beyond Zap
 - Social Event sponsored by the LMC
- Dot exercise – important issues to be addressed (listed in written form as presented at the retreat):
 - Finance policy (check & cash handling) – 0 votes
 - Social event sponsored by LMC – 0 votes
 - Peer award beyond ZAP – 0 votes
 - Non-reps on LMC – 3 votes
 - Completing the circle/follow through – **guiding principle not topic
 - Trainer transition – 4 votes
 - Training – 7 votes

- Employee orientation – 1 vote
- Knowledge bank / procedures – 5 votes
- Satisfaction survey – previously discussed as topic for future meetings
- Bureau business plan – 0 votes
- LMC communication and outreach – 2 votes
- OMF comprehensive review - **guiding principle not topic
- 2015 Office move – previously discussed as a topic for future meetings
- Budget – previously discussed as a topic for future meetings
- Equitable advancement opportunities – 2 votes
- Professional development – 4 votes
- Succession planning – 2 votes
- Equity lens - **guiding principle not topic
 - Joe, Frank, and Thomas to talk about agenda going forward
- Guiding principles rather than discussion topics
 - Communication and outreach
 - Equity
 - External and internal consideration
 - ADD DEC 17 AGENDA ITEM
 - Definition
 - Applicability within topic
 - Completing the circle
 - Customer Service
 - Healthy work environment

Suggestions that LMC can do to become more effective

- Labor having the opportunity to meet mid-month
- Co-chair meeting for direction
- Sub-committees, identify the point person for reports, meeting agendas, and calendar meetings
- Off-site meetings
 - Joe has offered his office but that would add time, transportation, and cost
 - Meghann to contact Melvin Mark for LMC meetings to be in 8th Floor Conference room – December 17

Time well spent?

- YES
 - Appreciation for:
 - Preparation
 - Show of positive directions, sense of optimism, open spirit
 - Encourage to see that there are common / shared goals
 - Good practice to re-charge, brainstorm, listen to all viewpoints, focus on LMC
 - Social interaction in addition to professional interaction
 - Trust and pure motive of betterment of work place, self, and bureau
 - Continuity

Add to December 17 Agenda:

- Inclusion of non-represented member (to be a part of Management caucus)
- Preamble to Budget Values and Guidelines (LMBAC 12/08/10)
- Employee Satisfaction Survey
- Trainer Transition
- Equity
 - Define
 - Applicability
 - Internal and external consideration

Sub-Committee Formed:

- Scott Karter and Karen Obana to edit and suggest a preamble for the Budget Values and Guidelines

Action Items:

- Scott and Karen to edit and suggest preamble for the Budget Values and Guidelines
 - If any suggestions from members outside of sub-committee e-mail both Karen and Scott
- Thomas will request and advocate at the OMF Leadership Team retreat next week for the Revenue LMBAC to be re-instated
- Meghann to look-up # of respondents v. # within the bureau for each year of the Employee Satisfaction Survey
- All – review all comments from the Employee Satisfaction Survey and return with themes and suggestions on how to address or actions that can be taken
- Joe, Frank, and Thomas to discuss Trainer Transition agenda item
- Meghann to contact Melvin Mark for all future LMC meetings to be in 8th Floor Conference room, starting with, if possible, the next meeting in December