

STATE OF CALIFORNIA
 Budget Change Proposal - Cover Sheet
 DF-46 (REV 08/15)

Fiscal Year 2016-17	Business Unit 0840	Department State Controller's Office	Priority No.
Budget Request Name 0840-006-BCP-BR-2016-GB 0840-007-BCP-BR-2016-GB		Program 0500300-PERSONNEL PAYROLL SERVICES 9900100-INFORMATION SYSTEMS	Subprogram

Budget Request Description
 Statewide Personnel/Payroll Training

Budget Request Summary

The State Controller's Office (SCO) requests \$307,000 (\$175,000 General Fund [GF]; \$132,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 and \$235,000 (\$134,000 GF; \$101,000 CSCRF) in 2017-18 to support 2.1 positions; and \$769,000 (\$380,000 GF; \$286,000 CSCRF; \$103,000 reimbursements) in 2016-17 and \$763,000 (\$377,000 GF; \$285,000 CSCRF; \$101,000 reimbursements) in 2017-18 and ongoing to support 7.4 positions to continue to meet ongoing needs for statewide personnel and payroll training.

Requires Legislation <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Code Section(s) to be Added/Amended/Repealed	
Does this BCP contain information technology (IT) components? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, departmental Chief Information Officer must sign.</i>	Department CIO <i>Todd Boltjes</i> Todd Boltjes, Chief Information Systems Division	Date 8/27/15

For IT requests, specify the date a Special Project Report (SPR) or Feasibility Study Report (FSR) was approved by the Department of Technology, or previously by the Department of Finance.

FSR SPR Project No. Date:

If proposal affects another department, does other department concur with proposal? Yes No
 Attach comments of affected department, signed and dated by the department director or designee.

Prepared By <i>Lisa Crowe</i> Lisa Crowe, Chief Personnel/Payroll Services Div.	Date 8/26/15	Reviewed By <i>Larry Norris</i> Larry Norris, Chief Admin and Disb. Division	Date 8/25/15
Department Director <i>Tom Yowell</i> Tom Yowell Chief Administrative Officer	Date 8-25-15	Agency Secretary <i>George Loras</i> George Loras Chief Operating Officer	Date 8/25/15

Department of Finance Use Only

Additional Review: Capital Outlay ITCU FSCU OSAE CALSTARS Dept. of Technology

BCP Type: Policy Workload Budget per Government Code 13308.05

PPBA <i>Oscar F. Chavez</i>	Date submitted to the Legislature 11/7/16
--------------------------------	--

BCP Fiscal Detail Sheet

BCP Title: Statewide Personnel and Payroll Training

DP Name: 0840-006-BCP-DP-2016-GB

Budget Request Summary

	FY16					
	CY	BY	BY+1	BY+2	BY+3	BY+4
Positions - Permanent	0.0	9.5	9.5	7.4	7.4	7.4
Total Positions	0.0	9.5	9.5	7.4	7.4	7.4
Salaries and Wages						
Earnings - Permanent	0	611	611	469	469	469
Total Salaries and Wages	\$0	\$611	\$611	\$469	\$469	\$469
Total Staff Benefits	0	316	316	243	243	243
Total Personal Services	\$0	\$927	\$927	\$712	\$712	\$712
Operating Expenses and Equipment						
5301 - General Expense	0	37	19	15	15	15
5304 - Communications	0	10	10	7	7	7
5322 - Training	0	15	10	7	7	7
5346 - Information Technology	0	87	32	22	22	22
Total Operating Expenses and Equipment	\$0	\$149	\$71	\$51	\$51	\$51
Total Budget Request	\$0	\$1,076	\$998	\$763	\$763	\$763

Fund Summary

Fund Source - State Operations						
0001 - General Fund	0	555	511	377	377	377
9740 - Central Service Cost Recovery Fund	0	418	386	285	285	285
0995 - Reimbursements	0	103	101	101	101	101
Total State Operations Expenditures	\$0	\$1,076	\$998	\$763	\$763	\$763
Total All Funds	\$0	\$1,076	\$998	\$763	\$763	\$763

Program Summary

Program Funding						
0500300 - Personnel/Payroll Services	0	1,076	998	763	763	763
9900100 - Administration	0	194	174	39	39	39
9900200 - Administration - Distributed	0	-194	-174	-39	-39	-39
Total All Programs	\$0	\$1,076	\$998	\$763	\$763	\$763

Personal Services Details

Salary Information

Positions	Min	Mid	Max	<u>CY</u>	<u>BY</u>	<u>BY+1</u>	<u>BY+2</u>	<u>BY+3</u>	<u>BY+4</u>
1587 - Sys Software Spec I (Tech) (Eff. 07-01-2016)				0.0	1.0	1.0	0.0	0.0	0.0
4800 - Staff Svcs Mgr I (Eff. 07-01-2016)				0.0	1.0	1.0	1.0	1.0	1.0
5393 - Assoc Govtl Program Analyst (Eff. 07-01-2016)				0.0	7.5	7.5	6.4	6.4	6.4
Total Positions				0.0	9.5	9.5	7.4	7.4	7.4

Salaries and Wages	<u>CY</u>	<u>BY</u>	<u>BY+1</u>	<u>BY+2</u>	<u>BY+3</u>	<u>BY+4</u>
1587 - Sys Software Spec I (Tech) (Eff. 07-01-2016)	0	74	74	0	0	0
4800 - Staff Svcs Mgr I (Eff. 07-01-2016)	0	71	71	71	71	71
5393 - Assoc Govtl Program Analyst (Eff. 07-01-2016)	0	466	466	398	398	398
Total Salaries and Wages	\$0	\$611	\$611	\$469	\$469	\$469

Staff Benefits	<u>CY</u>	<u>BY</u>	<u>BY+1</u>	<u>BY+2</u>	<u>BY+3</u>	<u>BY+4</u>
5150900 - Staff Benefits - Other	0	316	316	243	243	243
Total Staff Benefits	\$0	\$316	\$316	\$243	\$243	\$243
Total Personal Services	\$0	\$927	\$927	\$712	\$712	\$712

A. Budget Request Summary

The State Controller's Office (SCO) requests \$307,000 (\$175,000 General Fund [GF]; \$132,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 and \$235,000 (\$134,000 GF; \$101,000 CSCRF) in 2017-18 to support 2.1 positions, and \$769,000 (\$380,000 GF; \$286,000 CSCRF; \$103,000 reimbursements) in 2016-17 and \$763,000 (\$377,000 GF; \$285,000 CSCRF; \$101,000 reimbursements) in 2017-18 and ongoing to support 7.4 positions to continue to meet ongoing needs for statewide personnel and payroll training.

B. Background/History

The Personnel and Payroll Services Division (PPSD) of the SCO is responsible for issuing pay to employees of the state civil service, California State University (CSU) and Judicial Council utilizing the State Controller's Uniform State Payroll System (USPS). Currently over 150 departments and 24 CSU campuses serve the State of California. The state workforce is comprised of approximately 284,000 employees, represented by 21 state civil service bargaining units and 13 CSU bargaining units. Employees are located throughout California and in other states, and range from elected officials, managers and supervisors, and higher education faculty, to rank and file workers in various occupations.

The USPS is a decentralized system. Civil Service Departments and CSU Human Resources (HR) staff are responsible for entering data into the USPS to accurately generate personnel and payroll records. As a control agency, the SCO is responsible for ensuring that decentralized HR staff have the knowledge and training required to accurately enter source data and process transactions in the USPS to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner.

The Statewide Training Unit (STU) within PPSD was created in the mid-1970s with the goal of providing personnel/payroll training to HR staff in all civil service state departments at no-cost for those receiving training. The training courses are intended to provide HR staff with the essential knowledge, skills and abilities to accurately process personnel/payroll transactions (e.g. appointments, separations, overtime, pay differentials) and generate accurate and timely payroll using the USPS. Historically, the STU conducts about 75% of training in and around the Sacramento area.

The demand for statewide training classes has exceeded the number of classes that can be offered with existing resources. This issue dates back to 2002-03 when the SCO was able to address only 60 percent of the training requests submitted (3,617 training requests were received and 2,155 trainees were scheduled for training). Due to budget reductions, furloughs, personal leave programs, the need to complete critical mandated work, and the impact of the 21st Century Project, the SCO's ability to meet the demand for training significantly continued to decrease from 2003 through 2012. In response, the SCO used various methods to fairly and equitably assign the limited training spaces available including:

- Limiting enrollment to trainees in the Personnel Specialist classification or Personnel Specialist series.
- Limiting enrollment to trainees who were new Personnel Specialists or those who had not previously or recently taken a particular training class.
- Basing training enrollment on the results of a "first-come, first-serve" response to a training-needs assessment process.

Although these efforts allowed the STU to focus on training employees with the most critical need based on job functions, ultimately they were unsuccessful in enabling the SCO to meet the demand for training. Through a 2014-15 BCP, the SCO received 4.0 two-year limited-term positions, the SCO's ability to meet training demands began to increase, and it is expected that over 50 percent of the training needs will be met in 2015. However, this improvement will only be temporary unless permanent resources are retained to sustain and build upon the statewide training program. Therefore, this request would make permanent the 4.0 positions and add 4.0 new positions discussed within the Justification section.

Analysis of Problem

The following chart reflects a comparison of training requests to trainees scheduled for calendar years 2008 through 2015.

Training Requested/Scheduled History

Calendar Year	Training Requests Received	Trainees Scheduled	Percent of Training Needs Met
2008	5,742	1,502	26.2%
2009	7,045	2,107	29.9%
2010	5,236	1,664	31.8%
2011	3,085	1,362	44.1%
2012	5,548	846 ¹	15.5%
2013	5,885	2,225	37.8%
2014	7,137	2,894	40.5%
2015 ²	6,266	3,185	50.8%

¹ The number of trainees scheduled was very low in 2012 due to the need to design and develop MyCalPAYS training curriculum.

² 2015 Training Requests and Trainees Scheduled are actuals based on classes already taken and projected based on requests received during the Spring 2015 needs assessment.

With the 2.0 limited-term classroom positions received in 2014-15, it is estimated that the STU will be able to train 3,185 HR staff in 2015. As a result of this increase and a decrease in training requests, the percentage of training needs met for 2015 is 10.3% higher than 2014.

Currently, the STU offers a broad spectrum of classes that address the essential functions of HR staff members' job duties (please see Attachment I).

Prior to receiving additional funding for 2014-15 and 2015-16, all training provided by the STU was classroom training, except one online Garnishment Documentation course. Since hiring staff dedicated to eLearning, the STU has offered the following eLearning modules: Affordable Care Act (ACA) for civil service (released November 2014); three Personnel/Payroll Specialist Fundamentals modules (March – May 2015); and ACA for CSU (May 2015). The Attendance Documentation module will be offered in August 2015.

Resource History
(Dollars in thousands)

Program Budget	2010-11	2011-12	2012-13	2013-14	2014-15 ¹
Authorized Expenditures	\$553	\$553	\$569	\$652	\$1,119
Actual Expenditures	\$553	\$553	\$569	\$652	\$1,057
Revenues	-	-	-	-	-
Authorized Positions	5.5	5.5	5.5	5.5	9.5
Filled Positions	5.0	4.5	5.5	5.5	8.5
Vacancies	0.5	1.0	0.0	0.0	1.0

¹ PY has increased due to 4.0 positions and \$390,000 being authorized from a 2014-15 BCP for two years.

Workload History¹

Workload Measure	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
N/A	-	-	-	-	-	-

¹ Please see the Training Requested/Scheduled History table on page 2 for the number of trainees scheduled by Calendar Year.

C. State Level Considerations

Adequate statewide training of HR staff is essential to ensure that state employees receive the correct compensation to which they are entitled and do not incur financial or personal hardships resulting from errors in their salary or benefits. Salary and benefit errors ultimately result in a financial cost to the State and the taxpayer due to the time and money it takes to correct errors and/or research, respond to and resolve issues.

D. Justification

Analysis of Problem

The STU is responsible for administering classroom training, which involves updating curriculum and training materials to ensure that they reflect the current laws, rules, policies and procedures. The STU must also create new curriculum when necessary as the result of federal or state law changes, such as Pension Reform or the Affordable Care Act and bargaining unit agreements. Finally, the STU helps to close gaps in training identified as the result of quality reviews or audits. The STU consists of 6.5 permanent resources and 4.0 two-year limited-term positions, which expire on June 30, 2016. Of these, 6.0 positions are classroom trainers (2.0 are limited-term), 2.0 positions are eLearning developers (limited-term), and 2.5 positions provide logistical support and supervision. Utilizing current staff resources to full capacity and filling all available classroom seats, the gap between training requests received and trainees scheduled has decreased in 2014 and 2015, while increasing the number of courses available to HR staff. In 2014, the STU was able to accomplish the following:

Classroom Training:

- Enhanced and modified three existing instructor-led classroom training programs;
- Increased the number of trainees scheduled by 30 percent;
- From January 2015 to June 2015, the STU received 3,088 training requests and was able to schedule 1,409 trainees (45.63%);
- 3,178 training requests were received for the July 2015-December 2015 training period, with 1,776 trainees currently scheduled (55.88%).

As anticipated, the learning curve to prepare new training staff for full deployment was three to four months. After a full calendar year of statewide training, the STU is delivering more training than previously and anticipates increasing the quality and quantity of training delivered in the coming year.

eLearning:

- Developed and implemented six new eLearning modules/programs.
 - Personnel/Payroll Specialist Fundamentals eLearning Modules
 - Module 1: Introduction to State Business Partners
 - Module 2: Introduction to Forms
 - Module 3: Mainframe Systems Overview
 - Attendance Documentation Training
 - Affordable Care Act (ACA) Training
 - ACAS Database Training Module – Civil Service
 - ACAS Database Training Module – California State University
- Between November 2014 and June 2015, a total of 886 HR staff participated in the three Fundamentals eLearning courses and 1,661 participated in the ACAS Database Training Module – Civil Service eLearning course.
- CSU personnel/payroll staff will complete ACA training in summer 2015.

The "Fundamentals" modules prepare new personnel specialists for classroom instruction and minimize the class time spent on basic information, thus maximizing the class time spent conveying intermediate and advanced skills. This is the foundation of the STU's eLearning plan. Future eLearning products are planned to reduce the number of days spent in classroom training.

Furthermore, the Train the Trainer (TTT) Pilot program analysis was launched in July 2015. This program analysis will include evaluating the effectiveness of a TTT and providing recommendations and/or alternatives by: assessing agency/department needs and target audience; reviewing current Personnel Specialist training programs, curriculum, prerequisites/minimum requirements, metrics for effectiveness, pre- and post-testing, goals, and key accomplishments.

A survey of Personnel Supervisors and Managers conducted by the California Department of Human Resources (CalHR) in June 2013 indicates that 84.8% of respondents felt that training provided by control agencies, such as the SCO, was the preferred method for training Personnel Specialists. However, they expressed frustration with the SCO's limited availability of training sessions and spaces. In this same survey, Personnel Supervisors and Managers were asked to rate the expertise possessed by the Personnel Specialists who work in their offices as it relates to the essential functions of the job. The results indicated that

Analysis of Problem

the Personnel Specialists are either untrained or still learning 46% of the essential job functions. With adequate training, the Personnel Specialists can become fully proficient in their essential job functions.

The shortage of accurate and timely personnel, payroll, and disability training programs for HR staff has a significant impact throughout state government. When Personnel Specialists are not properly trained, the state and its employees experience an increase in:

- Departments receive Errors or "Ding" notices generated by the SCO, which occur when HR staff cannot process a personnel or payroll transaction properly – SCO and department staff time is required to research and resolve these errors. During 2013-14 and 2014-15 SCO generated and sent 41,412 notices. (Note: this substantial increase over 2011-12 and 2012-13, in which SCO generated 22,426 notices, is due to increased efficiency in tracking notices.)
- Overpayments and the resulting Accounts Receivables – a department specific workload results from establishing an accounts receivable, and repaying the overpayment may cause a hardship for the employee. In addition, the State does not have access to the monies until they are repaid.
- Underpayments and the need to issue Salary Advances – these may have a significant financial impact on an employee if their compensation and/or benefits are not processed correctly and promptly.
- Leave balance discrepancies – these may result in employees being authorized to take time off (with pay) for which they may not be entitled, or not having leave available when they need it.
- Retroactivity and its associated charges – additional staff time and cost results from processing retroactive personnel/payroll transactions.

All of these errors ultimately impact the state and the taxpayer in terms of direct costs and/or additional hours of staff time spent to correct errors and/or research, respond to and resolve issues. Such errors also produce financial hardships for employees if their salary or benefits are not correct and the state incurs financial costs (such as overtime) when staff must correct these errors.

Previous examples of the impact of errors and financial cost of poorly trained Personnel Specialists were documented in the following:

- *The June 2013 audit of the California Department of Corrections and Rehabilitation (CDCR) and California Correctional Health Care Services (CCHCS) conducted by the California State Auditor (CSA). In this report, the CSA found that:*
 - "The Correctional Agencies wasted state resources by improperly accounting for leave taken by employees, costing the State \$169,541."
 - "...undercharging leave occurred for 110 of the 170 employees whose time sheets and leave balances we examined...."
 - "Personnel specialists did not charge employee leave balances correctly due to a lack of understanding...."
 - "The Correctional Agencies likely undercharged leave at the other 27 correctional facilities." (Note: only six of the 33 correctional facilities were audited.)
- *The SCO's Payroll Review Report of the California Department of Parks and Recreation dated December 2012. In this report, the SCO found instances where:*
 - Out-of-Class Pay was not adjusted for employees receiving NDI resulting in overpayments of \$477.
 - 33.2% of Out-of-Class payments were not properly calculated. This resulted in:
 - Underpayments of \$217
 - Overpayments of \$3,616
 - 28 Employees on NDI were inappropriately given PLP (furlough) hours. The estimated cost to the state was \$14,300.
- *The California State Auditor's (CSA) High Risk Update, Report 2012-603, published in August 2014. The CSA found:*

Analysis of Problem

- "State agencies credited employees with roughly 197,000 hours of unearned leave" from January 2008 through December 2012. The value of unearned leave was estimated at \$6.4 million.

➤ *The joint Special Investigation of Additional Appointments of Supervisorial and Managerial Employees conducted by the SPB and CalHR.*

- In their final report, SPB states: "CalPERS should provide its personnel managers and staff with information and/or training on the laws, rules, and policies related to additional appointments."
- CalHR's final report indicates: "To minimize the error rates for appointments and payment of employees in the future, CalPERS' Chief of Human Resources is to ensure that all staff are adequately trained and provided with periodic refresher training."

The SCO has received additional requests for training as a direct result of the audits described above, as well as from the ongoing efforts of the Human Resources Audit Programs (HR Quality Reviews conducted by CalHR and Compliance Reviews conducted by SPB). Furthermore, in 2013-14 and 2014-15 the SCO Audits Division began to perform audits of payroll controls and payroll records, pursuant to Government Code Section 12476, which continues to highlight the need for departments to seek out more training.

The STU recognizes that the most efficient way to maximize the number of trainees that it can serve is to focus on the following key goals to increase efficiency and effectiveness:

- Maximize the amount of time that the trainers are in the classroom, rather than time spent updating training curriculum and materials
- Design, develop, implement and maintain interactive, effective eLearning tools where appropriate for the curriculum
- Provide opportunities for departmental staff to gain the necessary knowledge, skills and abilities to provide on-the-job training or supplemental training to their staff; potentially, this could include some form of "train the trainer," if appropriate
- Continue to offer classroom training when that is the most effective and efficient method for conveying critical job knowledge and skills

By applying these goals, the STU believes that it will ensure all employees in the State of California receive accurate compensation and benefits, by offering Personnel Specialists access to timely and effective HR training. During the past twelve years, the STU had been able to meet an average of 45.8% of the training requested. With the additional classroom trainers, the STU has surpassed this average, and expects to make additional progress as it makes the transition to the use of more eLearning tools. Estimated Training Requests and Trainees Scheduled for Classroom Training are shown below. The use of eLearning to augment the classroom training program is anticipated to augment the number of projected trainees scheduled for classroom training beginning in 2016, which should result in a decrease in the number of training requests.

Classroom Training Requested/Scheduled Projected

Calendar Year	Training Requests Received	Classroom Trainees Scheduled	Percent of Training Needs Met
2011	3,085	1,362	44.1%
2012	5,548	846 ¹	15.5%
2013	5,885	2,225	37.8%
2014	7,137	2,894	40.5%
2015 ²	6,266	3,185	50.8%
2016 ³	6,000	3,520	58.7%
2017 ³	5,700	3,840	67.4%

¹ The number of trainees scheduled was very low in 2012 due to the need to design and develop MyCalPAYS training curriculum.

² 2015 Training Requests and Trainees Scheduled are projected based on currently received requests.

³ 2016 and 2017 Training Requests are based on an estimated 5% decrease each year.

eLearning Completion Projected

Calendar Year	eLearning Completed
2011	0
2012	0
2013	0
2014	1,661
2015	1,900
2016	2,500
2017	3,750

Note: Projections are based on a conservative assumption that only newly hired HR staff will complete eLearning modules each year, based on the 3-year average 14.5% turnover rate of HR staff. Annual growth is based on additional eLearning modules being offered each year.

The estimated 5% decrease in classroom training requests per year is based on two conflicting assumptions: (1) as access to training increases to meet reported training needs, demand should decrease; (2) training needs reflect high turnover in the Personnel Specialist classification series, as 14% left their positions in the past year. Turnover is anticipated to materially accelerate over subsequent years as "baby boomer" retirements continue. Turnover for the past seven years is reflected in the below chart:

Personnel Specialist Series Turnover

Fiscal Year	Turnover Percentage Due to Permanent Separations	Turnover Percentage Due to Transfers to Other Classification Series	Total Turnover Percentage*
2008-09	5.5%	8.0%	13.5%
2009-10	6.3%	7.3%	13.6%
2010-11	5.1%	7.1%	12.3%
2011-12	5.7%	8.9%	14.7%
2012-13	6.5%	9.0%	15.7%
2013-14	5.9%	7.9%	13.8%
2014-15	5.4%	8.0%	14.0%

*The high turnover rate in the Personnel Specialist classification series has continued despite an annual recruitment and retention pay differential of \$2,400, which was implemented by CalHR in 2001.

Based on the above data, the SCO requests continuation of the 4.0 two-year limited-term positions on a permanent basis (2.0 classroom and 2.0 eLearning), received through an approved 2014-15 BCP, as well as an additional 2.0 permanent positions (1.0 for MIRS training and 1.0 for internal training) and two-year limited-term funding for 2.0 resources for the Learning Management System (LMS) and Support, to meet the STU's training objective. Refer to Attachment II for further details.

These positions would be funded on an ongoing basis to ensure the program maintains a high standard of current training via classroom instruction and web-based eLearning, enrolls trainees efficiently and fairly, and provides appropriate levels of training support to MIRS customer departments and internal employees. Furthermore, it is anticipated that additional ACA training modules and materials will be needed due to federal changes and clarifications.

Classroom Training – 2.0 Associate Governmental Program Analysts

These positions are required to continue to develop, deliver, improve and maintain classroom training. STU needs trainers with advanced skills and knowledge. Because the hiring pool lacked candidates with both personnel/payroll experience and training skills, hiring was based on training expertise. These new trainers were able to learn and teach the most basic courses (i.e., Fundamentals of Personnel, Employment History Overview, PAR Documentation) within three to four months after being hired. By assigning new trainers to teach these basic courses, STU has met over 80% of needs for basic courses. However, the needs for

advanced courses remain consistently high: STU expects to meet only 31.5% for Salary Determination courses, and 38.3% for Workers' Compensation courses. To show sustainable progress in all curriculum areas, new trainers need more time to develop expertise, which would result in these perennially high needs decreasing over time.

Based on a recent workload study of preparation time for classes conducted by the Trainers, as well as a survey of best practices from such sources as Weber State University, the American Society for Training and Development (ASTD), and the Department of Energy, it takes approximately 3 hours of preparation for each hour of classroom training to administer an existing curriculum. This time includes such tasks as reviewing reference documents, creating and updating course materials, and creating trainee job aids. The same research indicates that it takes between 30 and 43 hours to create each hour of new classroom training. This workload includes curriculum analysis, design, development, evaluation and revision. While the training preparation and design activities are critical to maintain the accuracy and relevance of the training, they further reduce the amount of time that Trainers can spend in the classroom.

eLearning - 2.0 Associate Governmental Program Analysts

These positions are required to continue to design, develop and update training curriculum and develop eLearning opportunities, and to maintain and update the eLearning offerings. The eLearning developers will build upon the progress made in 2014-15 by striving to attain additional objectives. STU will expand online offerings beyond the current audio-visual presentations, potentially including interactive webinars, videos, and instructor-led "chat" forums. Developers will reduce the number of days of current course offerings by replacing classroom days with eLearning modules. STU also plans to develop a proficiency test to enable trainees to "test out" of prerequisites in order to enroll in advanced courses. Among the topics planned for future eLearning development in the coming years are: position control, benefits, retirement codes, and direct deposit.

Management Information Retrieval System (MIRS) - 1.0 Associate Governmental Program Analyst

This position is required to provide MIRS training to state HR staff. MIRS is a report-generating application designed for state department staff. MIRS allows departments to create custom reports using departmental data from the USPS. Using MIRS is voluntary and is supported through fees assessed to users. Currently one analyst within the MIRS Unit provides system support services and training to approximately 115 state departments' staff using MIRS. The sole analyst is unable to provide the needed customer support and training. Without proper training and assistance state departments may be unable to generate accurate management data on a timely basis in order to make critical business decisions. As well, during days when training is being conducted, phone and email inquiries and requests to troubleshoot issues are unanswered until the training class has concluded. Reimbursement authority is being requested for this position.

Internal Training for PPSD - 1.0 Associate Governmental Program Analyst

This position is required to provide internal training to PPSD staff to develop and conduct internal training to help the division mitigate issues related to turnover and retirements, by improving knowledge transfer and workforce planning. The internal trainer would also train new staff members to assist with on-boarding and on-the-job development. Currently, when internal training is needed, staff members are temporarily redirected from their regular duties and production responsibilities to develop and deliver training to meet immediate needs, which has led to backlogs in other workload areas.

The California State Auditor, in a May 2015 audit, stated: "Workforce and succession plans provide departments the ability to forecast future workforce needs and develop strategies to ensure that they have a talented, competent workforce, and to mitigate the loss of institutional knowledge through attrition. It is particularly critical to engage in workforce and succession planning when large proportions of an organization are eligible to retire at roughly the same time, which continues to be a concern for California state government" (California State Auditor, High Risk Report 2015-608). The internal trainer is a critical piece of PPSD's succession plan. PPSD's situation is especially critical as 25.4% of PPSD's staff are currently eligible to retire (40.4% are over age 50) and PPSD needs to ensure that we provide mission-critical services to state departments, campuses and other stakeholders. The addition of one internal trainer would support PPSD's mission "to provide accurate and timely personnel and payroll services through quality customer service."

Learning Management System (LMS) and Support - 1.0 Systems Software Specialist I and 1.0 Associate Governmental Program Analyst (two-years)

These resources are required to plan, design, develop, and implement a new LMS for supporting training logistics and maintaining training history. Greater progress in eLearning development was hampered by the need to redirect resources to address issues with the existing training database and enrollment process. To mitigate the limitations of existing technology, staff spent considerable time reengineering outdated business processes and repurposing training development tools to create workarounds to improve scheduling and enrollment efficiency. To increase efficiency further, the SCO is requesting funding for a LMS. The STU completed an initial assessment of replacements for the existing LMS.

The SCO is requesting \$50,000 as well as limited-term funding for 2.0 resources to purchase a LMS that would be used to manage all aspects of training by automating and optimizing the administration, management, and delivery of STU's blended learning program. The LMS would automate and streamline training enrollment and support logistics while offering a platform to develop, assemble, manage, and deliver personalized curriculum to its customers. In the SCO's previous training BCP, additional funding for software was not requested; however, existing technology is no longer sufficient to handle training management needs.

Originally implemented in 2000, "On Track For Training" (OTFT) is the critical technology tool used by STU to:

- Enroll students
- Verify completion of prerequisites
- Send confirmations via email
- Prepare class rosters
- Capture completion of classes for billing purposes
- Report training history

OTFT is a necessary part of daily operations. However, this tool is licensed for only one PC, and has been unsupported for more than four years. The SCO planned to decommission it after the rollout of MyCalPAYS, so it has not been covered under a maintenance contract since 2012. The database has become unstable. Several years' worth of historical student record data is corrupt and cannot be used. The system crashes and must be rebooted an average of eight times per day. All training registration and/or changes must be manually keyed as it will not accept electronic uploads. On average it takes three minutes to update one employee record for enrollment only. It currently takes 164 hours to enroll 3,291 employee records. This time does not include updates, changes, or cancellations. Interim emergency workarounds have been implemented; however, the current situation is not sustainable over time. To sustain a blended learning environment the STU must have a software application to support the administration, documentation, tracking, reporting and delivery of training programs.

The additional staffing for planning and implementing a new LMS, and providing MIRS training and internal training, are necessary to maintain a satisfactory level of service to our external and internal customers, and to improve efficiency and workforce/succession planning. The LMS staff will plan, design, develop, and implement an LMS, thus increasing efficiency to improve customer service. The MIRS analyst will provide training to departments and personnel specialists that have waited up to six months for basic training, and will enable the current MIRS analyst to conduct needed refresher training, which has been conducted rarely for over two years. The internal training analyst will formalize knowledge transfer and improve onboarding and transitional training, lightening the training burden currently borne by supervisors and Payroll Officers.

Funding

Seeking reimbursement for training was considered, but it was determined to not be viable due to several factors. Most notably, the expense of training is considered a deterrent to the majority of Departments and the SCO wants to ensure, to the best of our capabilities, that all personnel and payroll staff receive adequate training to correctly perform their job functions. In addition, if we charge for our trainings, a majority of our available training spaces will be monopolized by the Departments with the largest training budgets. Therefore, General Fund and Central Service Agency (CSA) funds are being requested.

The STU is a CSA function supported through the General Fund. A portion of this General Fund is recovered from both special funds and federal funds through the statewide annual ProRata/SWCAP process and

becomes the State's Central Services Cost Recovery Fund. The funding required to support this proposal reflects the SCO's proportionate share of General Fund to Central Services Cost Recovery Fund.

E. Outcomes and Accountability

The desired outcome is that SCO will meet the demand for personnel, payroll, disability, MIRS, and internal training. In addition, the SCO will have sufficient training staff to analyze existing training and identify opportunities to create online training materials and curriculum to augment or streamline existing classroom training, when appropriate. These options will ultimately lead to the SCO's ability to provide training to an increased number of trainees when and where they need it, while minimizing travel costs.

By teaching two agencies (CDCR and CCHCS) to appropriately apply leave accounting rules and regulations, the departments would reduce waste by \$569,541 per year. Furthermore, by modifying and increasing access to the leave accounting training, the STU can ensure that Personnel Specialists understand the laws, rules and policies, and bargaining unit provisions related to leave usage and apply them consistently and correctly.

Projected Outcomes¹

Workload Measure	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
N/A	-	-	-	-	-	-

¹ Please see the Classroom Training Requested/Scheduled Projected table and the eLearning Training Scheduled Projected table on page 7 for the number of trainees scheduled by Calendar Year.

F. Analysis of All Feasible Alternatives

Alternative 1: Provide the SCO with \$307,000 (\$175,000 General Fund [GF]; \$132,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 and \$235,000 (\$134,000 GF; \$101,000 CSCRF) in 2017-18 to support 2.1 positions, and \$769,000 (\$380,000 GF; \$286,000 CSCRF; \$103,000 reimbursements) in 2016-17 and \$763,000 (\$377,000 GF; \$285,000 CSCRF; \$101,000 reimbursements) in 2017-18 and ongoing to support 7.4 positions to continue to meet ongoing needs for statewide personnel and payroll training. Of this request, \$50,000 is for a LMS to replace the existing obsolete technology and increase efficiency in developing, delivering, and administering training and reference tools statewide.

Pros:

- Increases the number of HR staff members who receive the training required to accurately enter source data and process transactions in the USPS to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner.
- Reduces errors or "Ding" notices generated by the SCO's USPS and the associated staff time and cost required to research and resolve these errors.
- Supports uniform application of applicable laws, rules and bargaining unit provisions to safeguard state resources.
- Provides the ability to continue to develop and provide new eLearning opportunities on a statewide basis.
- Reduces overpayments and the resulting accounts receivables; underpayments and the need to issue salary advances.
- Reduces leave balance discrepancies and retroactivity and the associated charges.
- Provides staffing to support and update newly created eLearning modules and tools.
- Replaces the outdated and unsupported OTFT training database with current technology, increasing efficiency by reducing time spent in scheduling, enrolling attendees, and maintaining training history.
- Increases support and improves customer service to MIRS departments.
- Increases the availability of training that has been deemed "most effective" by departmental personnel supervisors and managers.

Analysis of Problem

Provides the resources to analyze and develop more cost effective methods of training, such as "online learning."

Cons:

- Requires additional staffing and funding.

Alternative 2: Provide the SCO with \$535,000 (\$305,000 General Fund [GF]; \$230,000 Central Service Cost Recovery Fund [CSCRF]) two-year limited-term funding in 2016-17 to support 4.0 positions (2.0 for classroom training and 2.0 for the proposed LMS), \$459,000 (\$262,000 GF; \$197,000 CSCRF) two-year limited-term funding in 2017-18 to support 4.0 positions (2.0 for classroom training and 2.0 for the proposed LMS), \$440,000 (\$192,000 GF; \$145,000 CSCRF; \$103,000 reimbursements) permanent funding in 2016-17 to support 4.0 positions (2.0 for eLearning, 1.0 for a SSM I (Supervisor), and 1.0 for MIRS training), and \$438,000 (\$192,000 GF; \$145,000 CSCRF; \$101,000 reimbursements) permanent funding in 2017-18 and ongoing to support 4.0 positions (2.0 for eLearning, 1.0 for a SSM I (Supervisor), and 1.0 for MIRS training), to continue to meet ongoing needs for statewide personnel and payroll training. Of this request, \$50,000 is for the LMS to replace the existing obsolete technology and increase efficiency in developing, delivering, and administering training and reference tools statewide.

Pros:

- Requires less staffing and funding than Alternative 1.
- Increases the number of HR staff members who receive the classroom training needed to accurately enter source data and process transactions in the USPS to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner.
- Reduces errors or "Ding" notices generated by the SCO's USPS and the associated staff time and cost required to research and resolve these errors while additional eLearning opportunities are developed.
- Supports uniform application of applicable laws, rules and bargaining unit provisions to safeguard state resources while additional eLearning opportunities are developed.
- Reduces overpayments and the resulting accounts receivables while additional eLearning opportunities are developed.
- Lessens underpayments and the need to issue salary advances while additional eLearning opportunities are developed.
- Diminishes leave balance discrepancies while additional eLearning opportunities are developed.
- Reduces retroactivity and the associated charges while additional eLearning opportunities are developed.
- Increases availability of training deemed "most effective" by departmental personnel supervisors and managers.
- Provides ability to continue to develop and provide new eLearning on a statewide basis.
- Makes available staffing to support and update newly created eLearning modules and tools.
- Replaces the outdated and unsupported OTFT training database with current technology, increasing efficiency by reducing time spent in scheduling, enrolling attendees, and maintaining training history.
- Increases support and improves customer service to MIRS departments.

Cons:

- Requires additional staffing and funding.
- The above Pros would only be accomplished on a limited-term basis. As the funding and resources expire, the benefits of the training would be lost.
- Does not provide internal training as a critical part of knowledge transfer and succession planning.

Alternative 3: Retain current 4.0 positions permanently, providing the SCO with \$424,000 (\$242,000 General Fund; \$182,000 Central Service Cost Recovery Fund) in 2016-17 and ongoing, to continue to meet ongoing needs for statewide personnel and payroll training.

Pros:

Analysis of Problem

- Requires less staffing and funding than Alternative 1 and 2.
- Increases the number of HR staff members who receive the classroom training needed to accurately enter source data and process transactions in the USPS to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner.
- Reduces errors or "Ding" notices generated by the SCO's USPS and the associated staff time and cost required to research and resolve these errors while additional eLearning opportunities are developed.
- Supports uniform application of applicable laws, rules and bargaining unit provisions to safeguard state resources while additional eLearning opportunities are developed.
- Reduces overpayments and the resulting accounts receivables while additional eLearning opportunities are developed.
- Lessens underpayments and the need to issue salary advances while additional eLearning opportunities are developed.
- Diminishes leave balance discrepancies while additional eLearning opportunities are developed.
- Reduces retroactivity and the associated charges while additional eLearning opportunities are developed.
- Increases availability of training deemed "most effective" by departmental personnel supervisors and managers.
- Provides ability to continue to develop and provide new eLearning on a statewide basis.
- Makes available staffing to support and update newly created eLearning modules and tools.

Cons:

- The outdated and unsupported OTFT training database would not be replaced with current technology, likely requiring additional workarounds to schedule training and enroll attendees, but without maintaining training history.
- Support and improved customer service to MIRS departments will not be achieved.
- Does not provide internal training as a critical part of knowledge transfer and succession planning.

Alternative 4: Do Nothing

Pros:

- No additional staffing or funding is required.

Cons:

- Recently created eLearning tools and modules will not be maintained or updated as needed, shortening their usefulness.
- Additional eLearning opportunities will not be developed.
- HR staff will not receive the training required to accurately enter source data and process transactions in the USPS to manage the personnel resources of the State, account for salary and wage expenditures, and provide data to the retirement systems necessary for calculation of employee retirement benefits in a fiscally responsible manner.
- Errors or "Ding" notices generated by the SCO's USPS and the associated staff time and cost required to research and resolve these errors will continue at the current rate or increase as turnover rates increase and less experienced staff fill behind experienced HR staff.
- Overpayments and the resulting accounts receivables will continue; underpayments and the need to issue salary advances will continue.
- Leave balance discrepancies will continue; retroactivity and the associated charges will continue.
- The outdated and unsupported OTFT training database would not be replaced with current technology, likely requiring additional workarounds to schedule training and enroll attendees, but without maintaining training history.
- The SCO will continue to have limited training sessions and space availability.
- The SCO will not have the resources to analyze and develop more cost effective methods of training, such as "online learning."
- Support and improved customer service to MIRS departments will not be achieved.

- Does not provide internal training as a critical part of knowledge transfer and succession planning.

G. Implementation Plan

Approval of this request will appropriate sufficient funding to address the cost of this workload.

TIME FRAME	OUTCOME
May 2016 – June 2016	Recruit staff for new positions.
July 2016 (following Budget enactment)	Hire new staff.
July 2016 – October 2016	Train new staff.
November 2016	Begin providing expanded classroom and MIRS training to employees statewide.
July 2016 – September 2016	Prepare LMS procurement documents.
September – January 2017	Complete LMS procurement process.
January 2017 – June 2018	Develop, configure, and implement LMS.
November 2016 – December 2017	Develop additional eLearning to augment classroom training.
March 2017 – December 2018	Implement additional eLearning on a phased basis as development is completed.

H. Supplemental Information

In addition to the SCO standard OE&E complement, funding for General Expense, Training, Facilities and Data Processing is included within this request.

General Expense - \$18,000 is requested for a laptop, Elite desktop PC, monitors, standard software/licenses, a phone headset, and a modular workstation for one of the positions, in the BY.

Training - \$5,000 is requested for specialized IT training classes, in the BY.

Data Processing - \$58,000 in BY is requested for the LMS (this does not require a Project Approval Lifecycle) and specialized IT software (Visio Standard 2013, GoToWebinar, Redgate Tool Belt, and MSDN Subscription). \$3,000 in BY+1 is requested for specialized IT software (Visio Standard 2013, GoToWebinar, Redgate Tool Belt, and MSDN Subscription).

I. Recommendation

Approve Alternative 1 and provide the SCO with \$307,000 (\$175,000 General Fund [GF]; \$132,000 Central Service Cost Recovery Fund [CSCRF]) in 2016-17 and \$235,000 (\$134,000 GF; \$101,000 CSCRF) in 2017-18 to support 2.1 positions, and \$769,000 (\$380,000 GF; \$286,000 CSCRF; \$103,000 reimbursements) in 2016-17 and \$763,000 (\$377,000 GF; \$285,000 CSCRF; \$101,000 reimbursements) in 2017-18 and ongoing to support 7.4 positions to continue to meet ongoing needs for statewide personnel and payroll training. Of this request, \$50,000 is for a LMS to replace the existing obsolete technology and increase efficiency in developing, delivering, and administering training and reference tools statewide.

Statewide Personnel Payroll Training

STU Training Classes

Class Name	Classroom	eLearning	Notes ¹
Current Classes			
Corrective Actions	X		
Deferral of Lump Sum	X		
Employment History Overview	X	X	Long-Term. Supplement to classroom training. Supervisors will be able to choose between staff utilizing eLearning vs. going to classroom training.
Fundamentals of Payroll	X	X	Long-Term. Partial eLearning to reduce the number of days spent in classroom.
Fundamentals of Personnel	X	X	Short-Term. Partial eLearning to reduce the number of days spent in classroom.
Garnishment Documentation		X	
Non-Industrial Disability Insurance Program	X		
PAR Documentation	X	X	Long-Term. Supplement to classroom training. Supervisors will be able to choose between staff utilizing eLearning vs. going to classroom training.
Payroll Input Process (PIP)	X		
Introduction to Salary Determinations	X	X	Long-Term. Partial eLearning to reduce the number of days spent in classroom.
Advanced Salary Determinations	X	X	Short-Term. Partial eLearning to reduce the number of days spent in classroom.
Workers' Compensation: The Beginning Steps	X		
Workers' Compensation Documentation	X		
Personnel/Payroll Specialist Fundamentals			
<i>Introduction to State Business Partners</i>		X	
<i>Introduction to Forms</i>		X	
<i>Mainframe System Overview</i>		X	
Attendance Documentation--Timesheet		X	
Affordable Care Act (ACA)			
<i>ACAS Database Training - Civil Service</i>		X	
<i>ACAS Database Training - California State University</i>		X	
Projected Class Development			
Affordable Care Act (ACA) tool (TBD)		X	Short-Term
Attendance Documentation--Certification		X	Short-Term
New Employee Orientation (internal)		X	Long-Term
Position Control		X	Long-Term
Benefits Overview		X	Long-Term
Direct Deposit		X	Long-Term
Retirement Codes		X	Long-Term

¹ Short-Term: eLearning development could be as early as 2015-16. Long-Term: eLearning development could be within 2016-17 or 2017-18.

Statewide Personnel/Payroll Training

Personnel and Payroll Services Division (PPSD) Workload Description	New Annual Increased Workload/ Task	Annual Hours per Task	Total Increased Hours	Number of Positions
Classification: Staff Services Manager I (Supervisory)				
Major responsibility: Direct the activities of a team of analysts responsible for developing and providing personnel, payroll, and disability-related training to personnel specialists in Human Resources departments statewide, to ensure consistent interpretation of HR rules and maintain integrity of HR data systems.				
> Ensure quality and currency of training provided to department HR staff. Represent the department on task forces related to training and human resources issues and projects.	1	396	396	0.2
> Manage staff responsible for providing a variety of training programs to HR offices in state departments and facilities.	1	660	660	0.4
> Direct staff in development and improvement of training materials and tools for both traditional, classroom-based, and online training environments.	1	480	480	0.3
> Direct staff responsible for implementing new Learning Management System and organization change management needs.	1	240	240	0.1
Workload assumption: Supervisor provides direction in day-to-day business of training unit and ensures staff are current in training techniques and using technology effectively. Will supervise five analysts in addition to staff listed below.				
TOTAL: Staff Services Manager I (Supervisory)	4	1,776	1,776	1.0
Classification: Associate Governmental Program Analyst - Classroom				
Major responsibility: Perform analysis, make plans, and develop and deliver external training in support of divisional HR and payroll systems.				
> Develop training programs and plan activities to address training needs based on semi-annual needs assessment.	2	72	144	0.1
> Create and submit for publication training handbooks, reference materials, handouts, guides, exercises.	2	640	1,280	0.7
> Deliver training to personnel specialists.	80	24	1,920	1.1
> Act as subject matter expert by representing department on task forces and by researching issues and responding to internal and external customers.	60	2	120	0.1
> Make arrangements for offsite training, plan travel, complete travel claims.	24	4	96	0.1
Workload assumption: Based on new courses which require development time of 26-30 hours per hour of classroom instruction and the average class is 24 hours (3 days)				
SUBTOTAL: Associate Governmental Program Analyst	168	742	3,560	2.1
Classification: Associate Governmental Program Analyst - eLearning				
Major responsibility: Use technology tools to update and create online training materials				
> Create online training courses to enhance and increase training opportunities for departments.	16	165	2,640	1.5
> Deliver training to personnel specialists.	30	24	720	0.4
> Support and maintain technical training tools: research and analyze potential uses for technology in training.	24	8	192	0.1
Workload assumption: Based on online courses requiring a 43 hour development time per hour of instruction (online courses are about four hours).				
SUBTOTAL: Associate Governmental Program Analyst	70	197	3,552	2.0
Classification: Associate Governmental Program Analyst - MIRS				
Major responsibility: Act as MIRS consultant and conduct MIRS training				
> Deliver Initial MIRS training to personnel specialists	12	56	672	0.4
> Assist MIRS customers with report writing and report libraries via email and telephone.	12	80	960	0.5
> Troubleshoot connection/file transfer problems; add printers; build libraries for new users; monitor system costs.	12	12	144	0.1
Workload assumption: Based on workload analysis, initial training requires 56 hours per month; other monthly responsibilities are shared with the other analyst.				
SUBTOTAL: Associate Governmental Program Analyst	36	148	1,776	1.0
Classification: Associate Governmental Program Analyst - Internal Training				
Major responsibility: Perform analysis, make plans, and develop and deliver internal training in support of divisional HR and payroll systems.				
> Develop training programs and plan activities to address training needs to address needs identified by management	5	48	240	0.1
> Create and submit for publication training handbooks, reference materials, handouts, guides, exercises	5	192	960	0.5
> Deliver internal training to payroll specialists and analysts and other division staff in support of knowledge transfer and workforce planning efforts.	72	8	576	0.3
Workload assumption: Based on new courses which require development time of 26-30 hours per hour of classroom instruction and the average class is 8 hours				
SUBTOTAL: Associate Governmental Program Analyst	82	248	1,776	0.9
Classification: Associate Governmental Program Analyst - LMS				
Major responsibility: Act as lead business analyst for implementing new Learning Management System including planning, procurement, configuration, organizational change management				

Statewide Personnel/Payroll Training

<i>Personnel and Payroll Services Division (PPSD)</i> Workload Description	New Annual Increased Workload/ Task	Annual Hours per Task	Total Increased Hours	Number of Positions
> <i>Develop business process requirements, map existing process to future process, meet and collaborate with stakeholders.</i>	1	450	450	0.3
> <i>Represent training unit during procurement process through vendor selection, prepare necessary procurement documents.</i>	1	425	425	0.2
> <i>Act as business lead analyst during configuration, development, and user acceptance testing; address issues regarding database population. Create test cases and training plan. Prepare and implement change management process for new functionality.</i>	1	400	400	0.2
> <i>Document business process and procedures for administrators and end-users; create job aids. communicate changes to users.</i>	2	200	400	0.2
> <i>Report progress to management and stakeholders via meetings and documents; monitor and mitigate risks and issues; implement decisions.</i>	24	4	96	0.1
Workload assumption: Based on estimated timeframes and historical experience.				
SUBTOTAL: Associate Governmental Program Analyst	29	1,479	1,771	1.0
TOTAL: Associate Governmental Program Analyst	385	2,814	12,435	7.0
TOTAL: PPSD	389	4,590	14,211	8.0

<i>Information Systems Division (ISD)</i> Workload Description	New Annual Increased Workload/ Task	Annual Hours per Task	Total Increased Hours	Number of Positions
Classification: Systems Software Specialist I (Tech)				
Major Responsibility: Perform project and technical responsibilities specific to planning, selection, design, testing, implementation and administration of database and associated integration with web front end and/or commercial off the shelf software presentation layer, reporting, network services, and security services for the proposed technology platform for the Learning Management System. Participate as a technical team member and work with the customer, vendor, and technical partners to provide the SCO with optimal solution, its use, maximum security, and required availability.				
> <i>Develop the technical requirements and architecture framework for the solicitation document, and evaluate and score responses received.</i>	1	120	120	0.1
> <i>Validate technical components proposed for integration into SCO's or OTech's infrastructure</i>	1	20	20	-
> <i>Develop technical tasks, dependencies, and timelines for the project schedule.</i>	1	50	50	-
> <i>Participate in meetings with vendor/stakeholders specific to technical design, configuration, integration.</i>	30	2	60	-
> <i>Develop technical test cases and plans.</i>	1	80	80	-
> <i>Prepare work orders for OTech tasks and security.</i>	3	40	120	0.1
> <i>Perform technical tasks, such as configuration, installation, create database jobs, queries, scripts, and testing.</i>	7	40	280	0.2
> <i>Collaborate with customer, technical peers and OTech for integration activities and acceptance.</i>	15	2	30	-
> <i>Respond to and solve customer problems stemming from user acceptance and technical testing.</i>	4	20	80	-
> <i>Set up change management and version control configuration and procedures. Educate customer contacts on what is required to request and approve technical changes.</i>	3	40	120	0.1
> <i>Update system documentation/diagrams as changes occur.</i>	3	40	120	0.1
> <i>Set up tools to monitor and track database performance: capacity, security, and reliability; conduct a vulnerability and compliance security scan after system in production and resolve high risk findings.</i>	1	110	110	0.1
> <i>For first 90 days of system operation, confirm technical components operate as designed and resolve end user problems; monitor database; evaluate and implement change requests.</i>	60	8	480	0.3
> <i>Close out project - participate in lessons learned, move all documentation to network designations, update base inventory and enterprise architecture repositories, complete time reporting, and transition administration to database maintenance and operation staff</i>	1	70	70	-
Workload assumption: The workload is based on historical experience and workload.				
TOTAL: Systems Software Specialist I (Tech)	131	642	1,740	1.0
TOTAL: ISD	131	642	1,740	1.0

Statewide Personnel/Payroll Training

ADMINISTRATIVE SUPPORT WORKLOAD

CLASSIFICATION / TASK		Workload		
		Months	Hours per Month	Hours per Year
Associate Governmental Program Analyst	0.5			
General Administrative Support		12	15	180
Conduct and/or review analytical studies and surveys; formulate procedures, policies, and program alternatives; make recommendations on a broad spectrum of administrative and program-related problems; and review and analyze proposed legislation.				
Human Resources Services Support		12	15	180
Prepares formal memoranda or reports on personnel matters; reviews proposed personnel actions for conformity with regulations, classification or pay standards or good personnel practice. Prepares written examinations, and coordinates recruitment programs.				
Business Services Support		12	15	180
Supports day-to-day operations by acquiring and maintaining departmental facilities, manages and directs in-house and external employee training, administers publication of articles on the SCO intranet (COIN), manages forms, records, transportation and recycling programs and provides reproduction services.				
Accounting Support		12	15	180
Provides all accounting services pertaining to the SCO budget as to estimates of expenditures, reimbursements and revenues; payment of travel expenses claims and invoices, year-end accrual, billing of reimbursements to the agencies; advise management of forecasted expenditures relative to budgeted authority.				
IT Support		12	7	84
Provides analysis, development, installation, implementation, procurement, or support of information technology systems, multifunction automated office systems, microcomputer systems, and teleprocessing networks and/or systems.				
Program Correspondence and Customer Service		12	7	84
Responds to inquiries concerning policies and procedures and provide technical advice and assistance to staff, management, control agencies, and others.				
Total Estimated Hours				888