



# 2012 Human Resources Conference

May 30, 2012

# Welcome

Robert Blair, Director  
Ohio Department of Administrative Services

Brenda Gerhardstein, Deputy Director  
DAS Human Resources Division

# Legal and Legislative Update

Eric Harrell, Deputy Chief Counsel, DAS

Kristen Rankin, Policy Administrator, DAS

# Retroactive Termination of Benefits

- Federal health care reform restricts a health plan's ability to retroactively cancel medical coverage.
- General rule: Cancellation of coverage must be prospective.
- There are some exceptions.

# Retroactive Termination of Benefits

- Exceptions:
  - Non-payment of premiums
  - Divorce, where timely notification is not made
  - Intentional misrepresentation or fraud by the employee
- Contact HRD/OCB Policy and HCM and Agency HR Support if a retroactive termination issue arises.

# Medicare Portion of the FICA Tax

- Employees hired before April 1, 1986 are exempt from paying the Medicare portion of the FICA Tax.
- However, if the employee has a break in service and has been rehired on or after April 1, 1986, the employee no longer qualifies for the exemption.

# Medicare Portion of the FICA Tax

- Agencies need to ensure that the FICA status field in OAKS is correct for these employees.
- Questions about this field may be directed to HCM and Agency HR Support.

# Legislative Updates

- Proposed changes to ORC 124 in the MBR:
  - Eliminate DAS involvement in county issues, unless the county contracts with DAS to perform certain functions.
  - Clean up fall back rights language to resolve the issue of certified vs. permanent status.
  - Minor change to the number of applicants on an eligible list for civil service testing.

# Legislative Updates

- Proposed changes to civil service testing for veterans (SB 288):
  - New language gives members of the reserve components of the armed forces of the United States, including the Ohio National Guard, an additional 15% credit of the person's total grade.
  - Establishes that reserve members also receive preference over non members of the reserve. Ties between veterans with 180 days active duty and reserve members are broken in favor of the active duty veteran.

# Social Media Policies

- Many Employers are creating policies that address the personal use of social media both on- and off-duty.
- As you create your policy, must keep in mind:
  - First Amendment protections
  - Employees' right to engage in concerted, protected activity

# Social Media Policies

- Employee postings on social media sites may be protected by the First Amendment.
  - If the speech is a matter of public concern, and
  - The employee spoke as a private citizen and not as a public employee, and
  - The employee's speech interest outweighs the employer's interest in efficiency and effectiveness.  
(Balancing test)
- Certain speech is not protected at all: defamation, obscenity, fighting words, true threats

# Social Media Policies

- Labor law protections
  - NLRA and ORC 4117 protect an employee's right to engage in concerted activity.
- How does this relate to social media use?
  - The NLRB has overturned terminations of employees that were based on off-duty comments made on social media sites because the Board found that the employee was engaged in protected, concerted activity.

# Social Media Policies

- The NLRB has also found social media policies to be overbroad when:
  - It would “reasonably chill” employees from communicating about wages, hours, and working conditions.
  - It prohibited discussion of wages, discipline, and evaluations.

# Social Media Policies

- Tips as you create your policy:
  - Do not make your policy overbroad.
  - Do remind employees that the internet is a public place.
  - Do include restrictions on how much on duty time employees can use for personal matters.
  - Do include restrictions on employees posting confidential personal information about others, especially if it is information they have access to as part of their official duties.

# Social Media Policies

- More tips:
  - Do apply your harassment policy to social media.
  - Do not ban employees from ever discussing the Employer.
  - Do ban comments that are intended to be humiliating, abusive, or hostile.
  - Do educate employees on the policy and the impact of what they post in what they may think is their “personal” space.

# Social Media Policies

If you have questions, please contact:

DAS HRD/OCB Policy

(614) 752-5393

[DASHRD.HRPolicy@das.state.oh.us](mailto:DASHRD.HRPolicy@das.state.oh.us)

# Workforce Planning



Overview, Benefits, Tools, and Updates

Office of Workforce Administration  
Compensation and Workforce Planning Group  
Ashley Hughes, Manager  
<http://wfp.das.ohio.gov>  
614.466.7795

# DAS Workforce Planning Team

- Joe Ann Lucas, HCM Senior Analyst
- Laura Sutherland, HCM Senior Analyst
- Morgan Webb, HCM Senior Analyst

## Workforce Planning Partners:

- Mona Reed, Governor's Office
- Todd Clark, OBM



# Workforce Planning: Overview

Simply put, it is the framework management relies on for making staffing and resource decisions that are linked to the agency's mission, strategic plan, and budgetary resources.



# Workforce Planning: History of Initiative

- Received a management lab grant from The PEW Center on the States in 2009.
  - DAS created workforce planning tools and guides and worked with three pilot agencies on developing workforce plans.
- DAS issued Workforce Planning Directive HR-D-15 in 2010 requiring agency submissions of workforce plans.
- Directive reissued in 2011 and updated in 2012.
  - Incorporated HR-D-01 on Organization Charts / TO's
- In March 2012, OBM rolled out Hiring Control Memorandum which requires workforce planning to be an essential activity in order to receive and adjust personnel ceilings.

# Workforce Planning: Benefits

*The intent of the workforce planning initiative is for DAS to create a strategic workforce plan template and tools in order to:*

- Create a framework for agencies to document how staffing decisions are linked to agency mission, goals and objectives;
- Communicate how to align human resources, fiscal, and technological resources to meet agency needs;
- Develop a tool to use when analyzing and presenting agency budget and resource needs.

# Workforce Planning: Other Benefits

- Workforce Planning is a mechanism by which the State can achieve its intended philosophy of controlling the size and cost of government while maintaining quality services.
- Attraction and retention of a capable and diverse workforce.
- Ongoing professional development of existing workforce.
- Appropriate planning to ensure transition of institutional knowledge.
- Effective use and maintenance of a classification plan that facilitates planning decisions and alignment of strategic business goals.



# Workforce Planning: Analysis Activities

Activity	Effort	Result
<b>Demand Analysis</b>	<ul style="list-style-type: none"><li>• Prepare/review business plan</li><li>• Budget plan</li></ul>	<ul style="list-style-type: none"><li>• Workload transaction measurements and data</li></ul>
<b>Supply Analysis</b>	<ul style="list-style-type: none"><li>• Evaluate workforce demographic data</li><li>• Report on WFP indicators</li></ul>	<ul style="list-style-type: none"><li>• Workforce profiles</li><li>• Trends/predictors</li></ul>
<b>Gap Analysis</b>	<ul style="list-style-type: none"><li>• Illustrate demand analysis data vs. supply analysis data</li></ul>	<ul style="list-style-type: none"><li>• Summary of where the differences are between the demand and supply</li></ul>
<b>Solution Analysis</b>	<ul style="list-style-type: none"><li>• Prepare prioritized list of gaps</li></ul>	<ul style="list-style-type: none"><li>• Future actions for staffing and/or restructuring to meet business needs</li></ul>

# Workforce Planning: Directive HR-D-15

*To require agencies to develop a workforce planning policy and establish uniform guidelines for developing those policies.*

Intended philosophy:

- Control the size and cost of government
- Optimize supervisor to subordinate ratios
- Utilize the most cost effective classifications to deliver the best possible service



# Workforce Planning: Directive HR-D-15

At a minimum each plan must contain:

- A statement of the agency's missions & goals;
- A current table of organization;
- A summary report of the workforce indicators tracked (outlined in the Workforce Planning Guide);
- A strategic action plan aimed at developing internal employees and/or recruiting qualified employees to avoid gaps in filling critical staffing needs and intended future action plan for all other positions;
- A statement indicating how the agency has aligned its workforce plan with its budget;
- A plan to monitor progress; and
- A Civil Service Test exemption form.



# Workforce Planning: Directive HR-D-15

Consider the following individuals for agency workforce planning teams:

- Agency Human Resources Administrator;
- Agency Fiscal Officer (well versed in budget and funding);
- Agency Labor Relations Administrator;
- Agency Chief of Staff.



# Workforce Planning: Tools

In an effort to assist agencies in preparing and submitting their workforce plan, DAS offers the following tools on our workforce planning website (<http://wfp.das.ohio.gov>):

- Workforce Planning Timeline
- Workforce Planning Guide
- Sample Workforce Plan
- Job Aids
- Other Workforce Planning Resources



# Workforce Planning: Tools

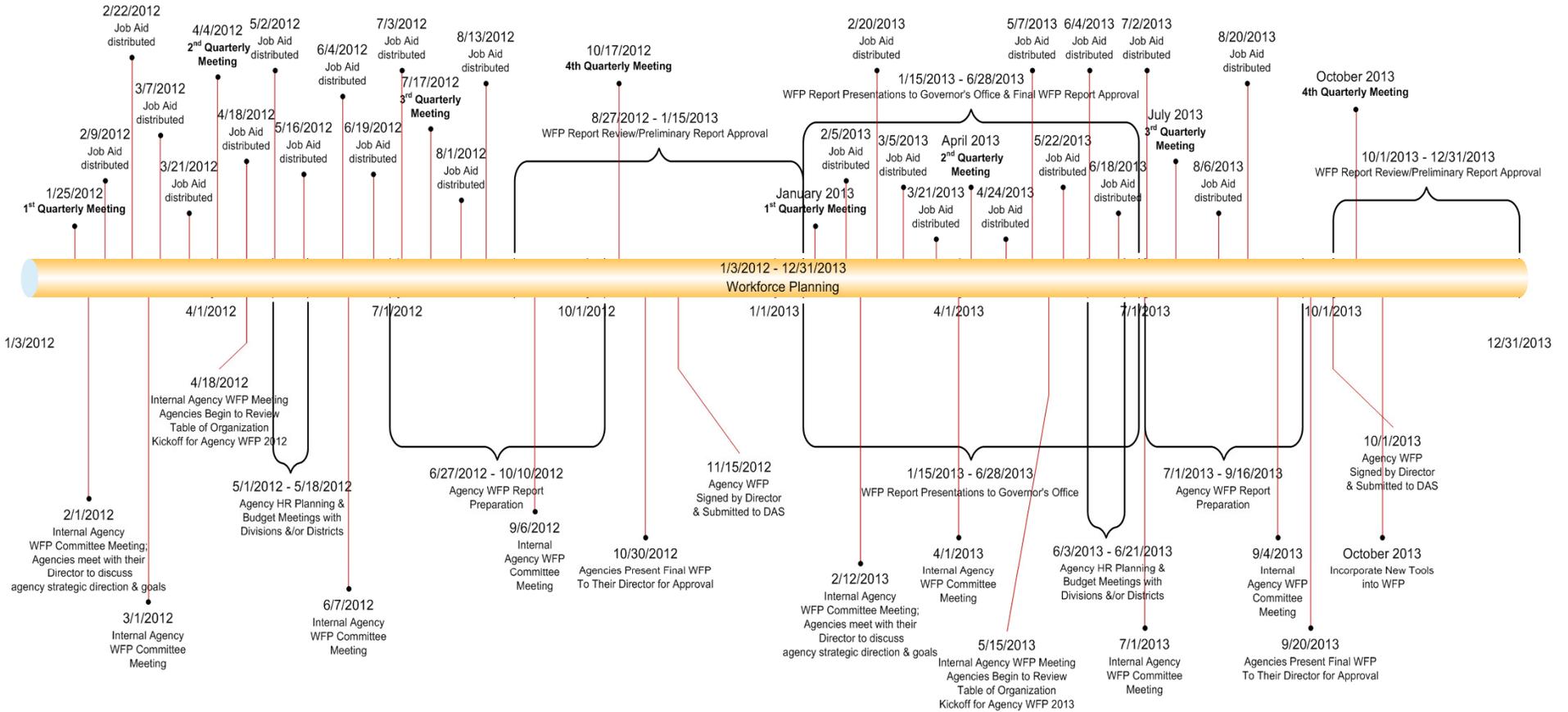
Also available on the website:

- Forms and Templates
- Communication Documents
- Frequently Asked Questions (FAQs)

DAS also conducts quarterly meetings to discuss components of workforce planning.

- July 17, 2012
- October 17, 2012





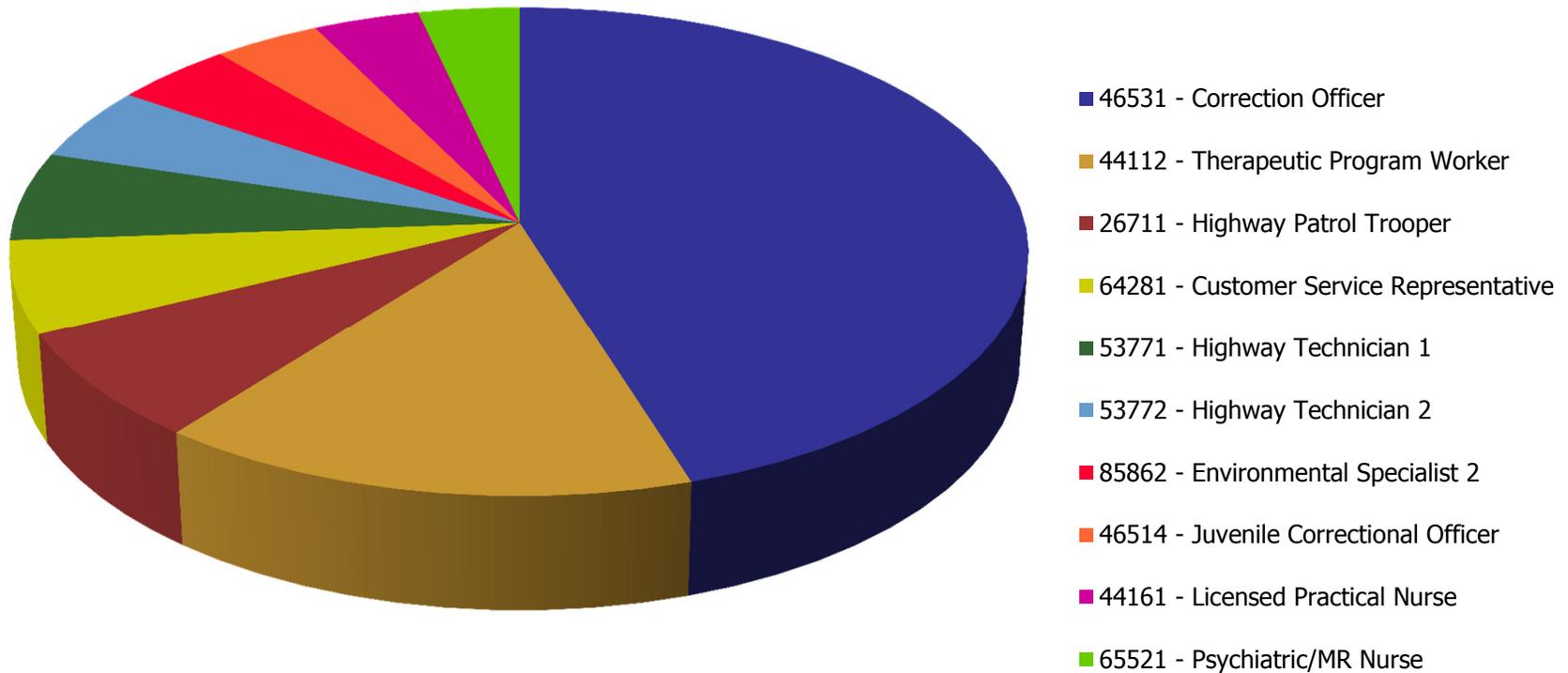
WFP Project Timeline: Jan. 2012 – Dec. 2013

# Workforce Planning: The WFP Guide

- Outline of components to include in plan (e.g., executive summary, action plan, etc.)
- Includes Table of Organization guidelines
- Gives examples of workforce indicators and standard Business Intelligence (BI) reports (e.g., Most Populated Job Classifications, Retirement Projections, Workforce Composition)

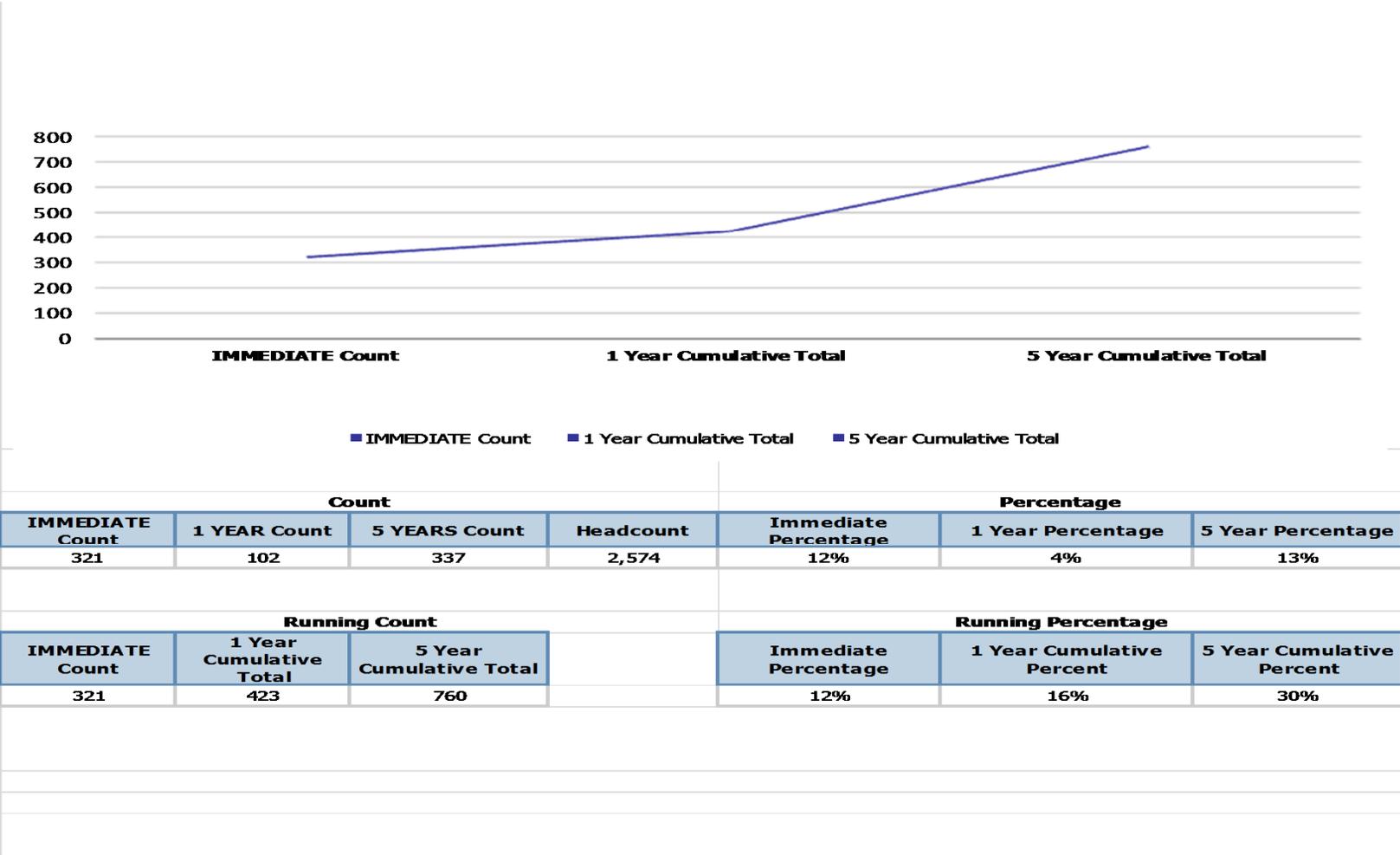


# WFP BI Reports: Most Populated Job Classifications



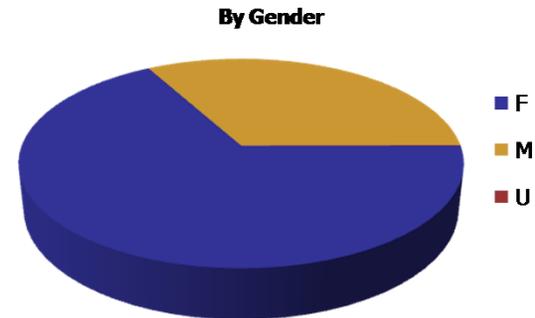
# WFP BI Reports: Retirement Projections

## Retirement Projections - Agency Wide

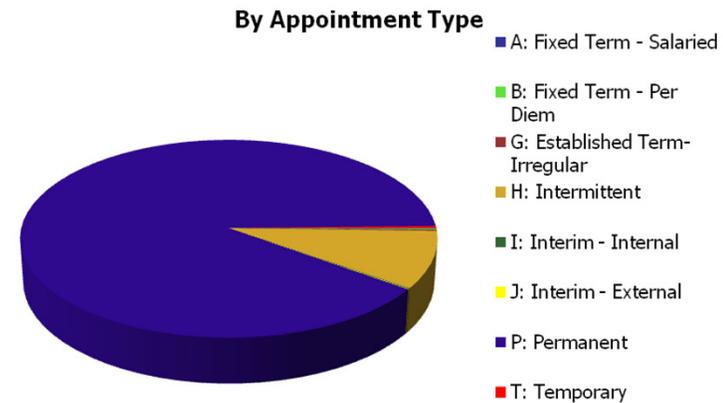


# WFP BI Reports: Workforce Composition

Gender	Count	Percentage
<a href="#">F</a>	2,542	67%
<a href="#">M</a>	1,253	33%
<a href="#">U</a>	3	0%
<b>Summary</b>	<b>3,798</b>	



Appointment Type - Ohio Job	Count	Percentage
<a href="#">P: Permanent</a>	3,406	90%
<a href="#">H: Intermittent</a>	354	9%
<a href="#">T: Temporary</a>	13	0%
<a href="#">G: Established Term- Irregular</a>	8	0%
<a href="#">B: Fixed Term - Per Diem</a>	7	0%
<a href="#">I: Interim - Internal</a>	4	0%
<a href="#">A: Fixed Term - Salaried</a>	3	0%
<a href="#">J: Interim - External</a>	3	0%
<b>Summary</b>	<b>3,798</b>	



# Workforce Planning: More Tools

- Job aids are sent out twice a month containing an article relevant to workforce planning and detailed, step-by-step instructions on running standard BI reports.
- To date, DAS has sent out 9 job aids which include instructions on running the following reports:
  - Retirement Projection, Highest Longevity Job Codes, Most Populated Job Codes, Employees at Max Salary, Average Compensation Rate, Point in Time Table of Organization, Span of Control, Workforce Composition, and Open/Filled Positions

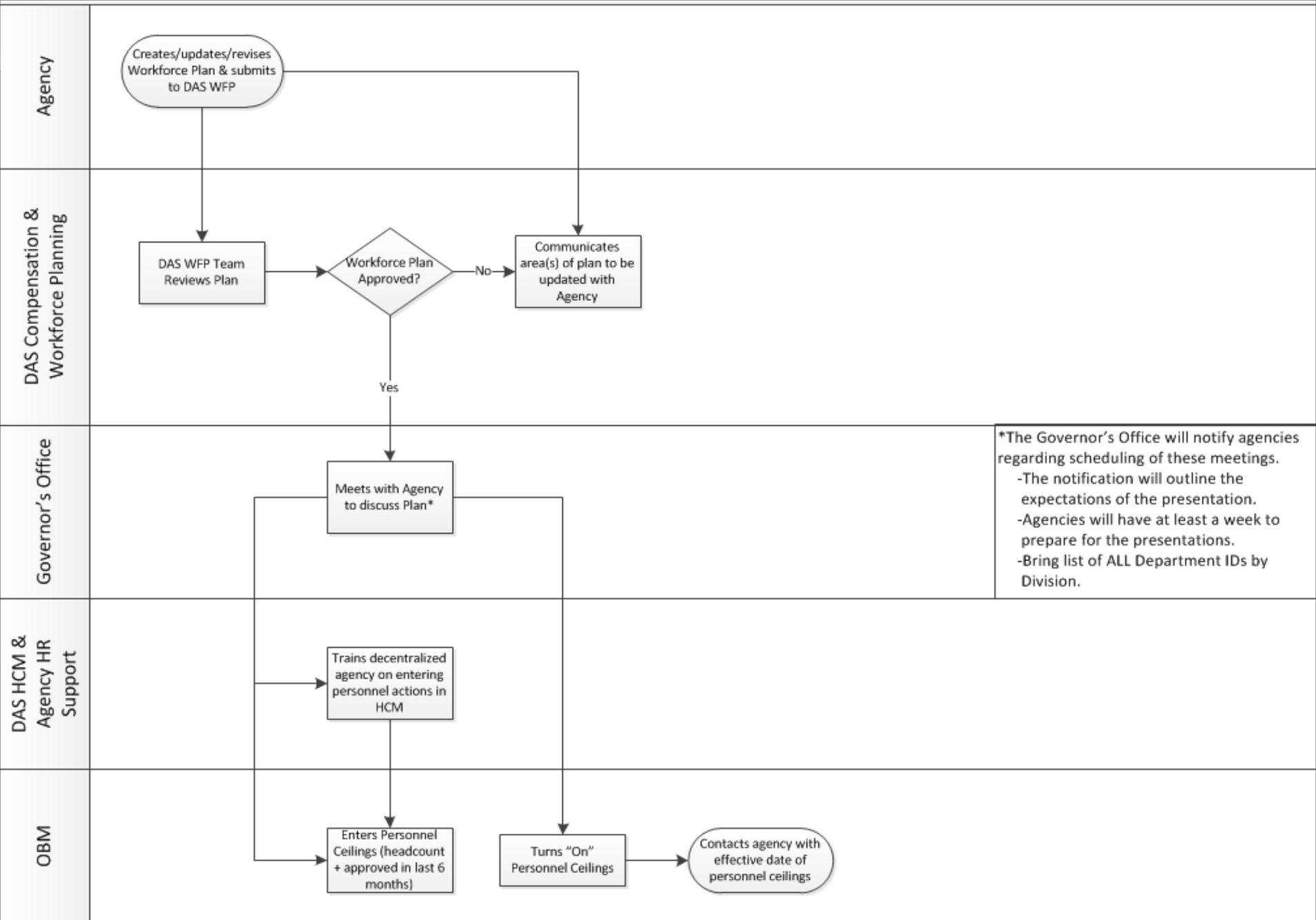


# OBM Hiring Control Memorandum

- On March 30, 2012, OBM issued a memorandum regarding moving from position-by-position approvals for hiring to an agency personnel ceiling.
- How does this impact workforce planning?
  - Agencies operate under the position-by-position approval process until they have submitted a workforce plan that has been approved by DAS and the Governor's Office.

Process for Turning on Personnel Ceilings

Timeline: 30-60 days



# OBM Hiring Controls & Workforce Planning

How will this affect workforce planning in the future once an agency has established a personnel ceiling?

- After personnel ceilings are set, agencies will have the opportunity to ask for an adjustment to their personnel ceiling during the annual DAS Workforce Planning process.
- Future Action Item: Officially rolling out template forms to submit with the workforce plan in order to request an adjustment to the ceiling.

## Caution: Some Job Codes Still Require Position-by-Position Approval

FISCAL POSITIONS		
16511 Account Clerk 1	63317 Business Administrator 3	66116 Accountant/ Examiner Supervisor 2
16512 Account Clerk 2	63318 Business Administrator 4	66531 Fiscal Specialist 1
16513 Account Clerk 3	66111 Accountant/ Examiner 1	66532 Fiscal Specialist 2
16515 Account Clerk Supervisor	66112 Accountant/ Examiner 2	66535 Fiscal Officer 1
63311 Business Service Officer	66113 Accountant/ Examiner 3	66536 Fiscal Officer 2
63315 Business Administrator I	66114 Accountant/ Examiner 4	66537 Fiscal Officer 3
63316 Business Administrator 2	66115 Accountant/ Examiner Supervisor 1	66538 Fiscal Officer 4

# Caution: Some Job Codes Still Require Position-by-Position Approval

## IT POSITIONS

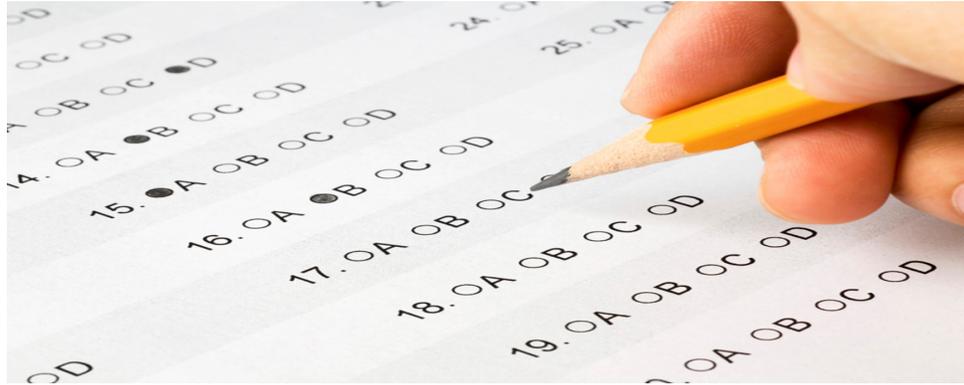
52485 Telecomm Network Supvr.	64163 IT Consultant 3	69921 Information Technologist 1
52495 Telecomm Analyst Supervisor	64131 Data Systems Manager	69922 Information Technologist 2
64117 IT Supervisor 1	67121 Bus. Continuity Analyst 1	69923 Information Technologist 3
64118 IT Supervisor 2	67122 Bus. Continuity Analyst 2	69931 Infrastructure Specialist 1
64119 IT Supervisor 3	67125 Bus. Continuity Analyst Supervisor	69932 Infrastructure Specialist 2
67115 Tele Systems Analyst Supvr.	64135 Data Systems Admin.	69933 Infrastructure Specialist 3
64132 IT Manager 1	67135 Network Administration Supervisor	69934 Infrastructure Specialist 4
64133 IT Manager 2	67136 Network Administration Manager	69971 IT Architect/ Consultant
64134 Data Systems Assist. Admin.	67196 Network Services Supvr.	
67126 Business Continuity & Data Access Manager	67197 Network Services Manager	

# Workforce Planning Directive Updates

- Directive was updated in response to OBM's Hiring Control memorandum to capture the relationship between workforce planning and personnel ceiling adjustment requests.
- The directive update also added in the requirement that agencies submit any updates to the Civil Service Test Exemption form with each annual workforce plan submission.



# Civil Service Test Reform



## Overview, Benefits, Tools, and Updates

Jessica Schuster, Administrator  
Office of Workforce Administration  
[dastestservices@das.state.oh.us](mailto:dastestservices@das.state.oh.us)

614.466.7795

# Civil Service Testing Overview & Benefits

- Civil Service Testing Reform has been implemented; all agencies are now decentralized for the purpose of testing.
  - Agency maintains own eligibility list(s)
  - Eligibility list(s) expire either with individual postings or live up to 1 year
- The Civil Service Test Exemption form allows the Director of DAS to exempt an agency from administering civil service tests for certain reasons.
  - Licensure or advanced education required for position;
  - Positions normally filled under collective bargaining rules, promotion, reinstatement or reduction; or
  - Costs/feasibility

- Ohio Revised Code 124.23

# Civil Service Testing: Tools

- DAS has partnered with a consultant to roll out statewide training on Test Development and Administration.
- All-day workshops are scheduled into June
- A few additional workshops will offer more in-depth training on specific topics.



# Civil Service Testing: Tools

- Modules offered in training include:
  - Legal Issues, Liabilities, & Adverse Impact
  - EEOC Guidelines, Standards & Principles
  - Job Analysis
  - Test Validation Models
  - Alternative Selection Procedures
    - Written Tests
    - Structured Interviews
    - Qualification, Education & Experience (QEE)
    - Assessment Centers
  - Item Writing
  - Establishing Cut Scores & Component Weighting
  - Test Administration & Security
  - Writing a Final Report



# Civil Service Testing: Tools

## OHMS Job Aids

- Adding a Written Exam Evaluation Step (Scored or Pass/Fail)
- Adding a Test Date
- Adding Test Location
- Adding Oral Exam Dates
- Adding Oral Exam Raters
- Manually Schedule Applicants for Exam
- Allow Applicant to Self-Schedule for Exam
- Create Master Answer Sheet with ScanTools Plus
- Upload Scanned Answer Sheets with ScanTools Plus
- Manually Create Master Answer Key
- Manually Add Results from Answer Sheets
- Produce and Print Item Analysis

# Civil Service Testing: FAQ Highlights

- Agencies may conduct transfer studies and share valid exams for common classifications.
- DAS will not allow agencies to borrow previously developed/administered DAS civil service tests.
- All civil service tests must be validated and must have established pass points.
- DAS's role in civil service testing will be to provide training and/or consultation to agencies.



# Civil Service Testing: Next Steps

- Formal policy and guidance on civil service testing and test administration will be forthcoming.
- Website and toolkit updates

# Workforce Planning: 2012 Submissions

**Agencies who submitted workforce plans in calendar year 2011:** Required to submit a workforce plan no more than 60 days after the biennial operating budget submissions are due.

**Agencies who submitted workforce plans in calendar year 2012:** Not required to submit a workforce plan until 2013. However, DAS encourages agencies to review workforce plans in conjunction with their budget submissions and submit to DAS any workforce plan updates.

- **Future action item:** Workforce Planning Modification Form

***\*All agencies will be required to submit workforce plans in the fall of 2013.\****



# Workforce Planning: Next Steps

- 100% Agency Workforce Plan Submission by Fall/Winter 2012
- Future Evolution of Tools and Templates to Utilize in Developing & Updating Agency Workforce Plans
- Content included in Workforce Plans will become more sophisticated and include more components  
(e.g., Succession Planning documentation)





# OAKS HCM UPGRADE PROJECT

*May 30, 2012*

Ohio Administrative Knowledge System



Today Tomorrow Together



- ✓ Explain how the project supports the State's vision and objectives
- ✓ Clarify your role and expectations for participation
- ✓ Communicate the project scope and timeline
- ✓ Provide information for you to use when communicating with your Agency about this project



## **The OAKS HCM Upgrade Project will update the existing OAKS HCM application from version 8.9 to 9.1 to:**

- Keep technology current
- Maintain vendor support agreements
- Lower cost of ownership
- Take advantage of new enhancements to OAKS HCM
  - Human Resources
  - Payroll
  - Benefits Administration
  - Time and Labor
  - ePay, eBenefits, eProfile
  - eProfile Manager Desktop
- Implement ePerformance
- Launch Electronic Personnel Action Request (ePar)



## **OAKS HCM Upgrade Project Benefits:**

- Enhance the user experience
- Provide functionality enhancements to the existing HCM application
  - Printable PDF Paycheck
  - Online W2 forms
  - Retroactive Pay Features
- Automate and process online personnel actions requests (ePar)
- Process online performance reviews; facilitate and streamline the overall performance management process (ePerformance)
- Drive further adoption of OAKS Statewide

## What is ePerformance?

**An automation of the current *Ohio Performance Review System* and the set of paper performance evaluation forms**

**A Statewide system that will utilize OAKS' self-service functionality**

**A system that provides ALL with an electronic workflow management system**

**A mechanism for Standardized Reporting / Trending**

# LOOK AND FEEL



Currently, HCM 8.9 has a navigation toolbar docked on the left hand side of the page. Clicking on the menu tab creates a dropdown effect

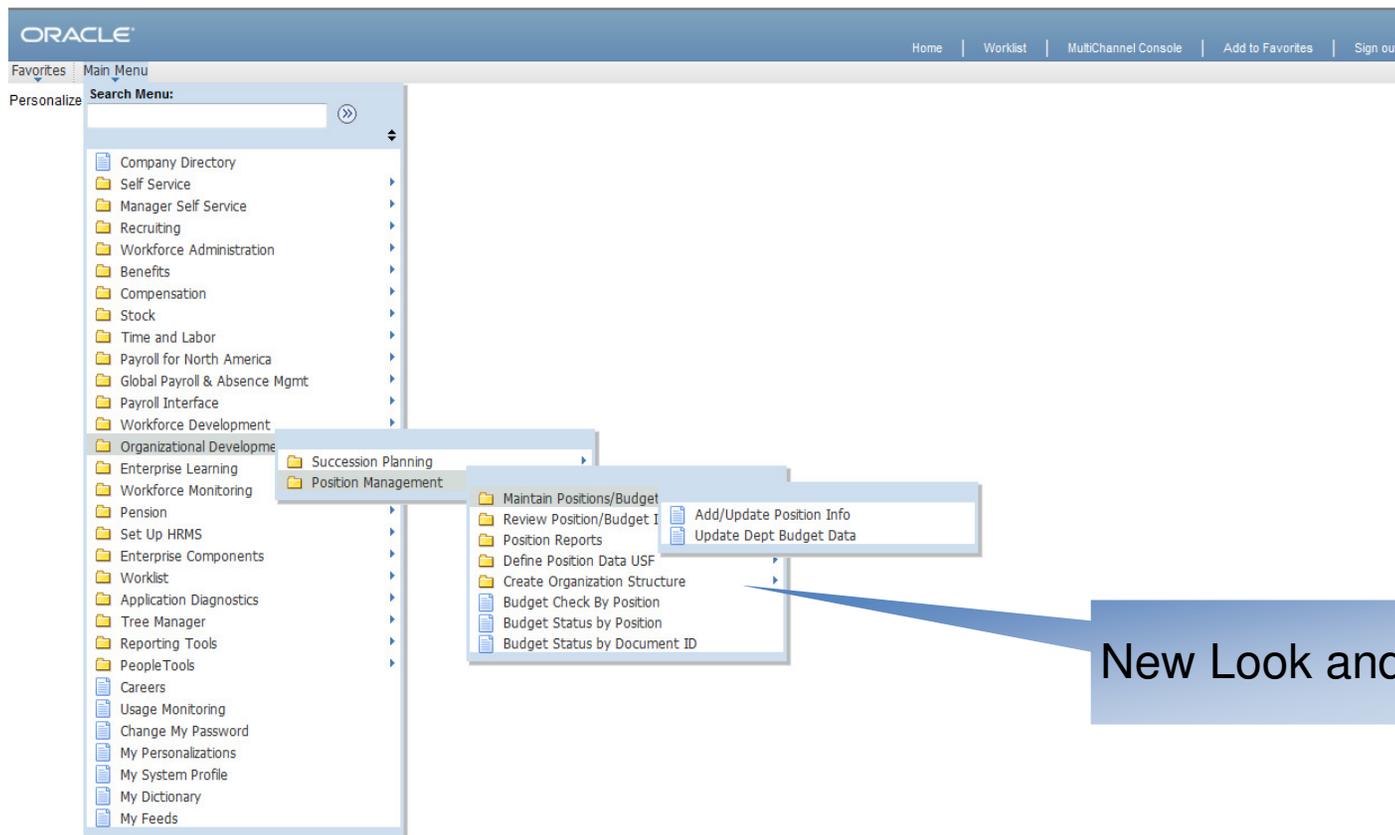
The screenshot displays the HCM/ePay web application interface. On the left, a vertical navigation menu is docked, featuring a search bar and a list of menu items such as "My Favorites", "Custom Architecture", "Self Service", "Manager Self Service", "Workforce Administration", "Benefits", "Compensation", "Time and Labor", "Payroll for North America", "Payroll Interface", "Workforce Development", "Organizational Development", "Position Management", "Maintain Positions/Budgets", "Review Position/Budget Info", "Position Reports", "Create Organization Structure", "Position Interfaces", "Workforce Monitoring", "Set Up HRMS", "Set Up SACR", "Enterprise Components", "Tree Manager", "Reporting Tools", "PeopleTools", and "My System Profile". The "Maintain Positions/Budgets" menu item is currently selected, and its sub-items, "Add/Update Position Info" and "Update Dept Budget Data", are visible in a dropdown. The main content area on the right shows the breadcrumb trail "Main Menu > Organizational Development > Position Management >" and the title "Maintain Positions/Budgets". Below the title, a description states "Identifies positions within organization, budgets for positions, and allows for creation of job requisitions". Two main action buttons are present: "Add/Update Position Info" (with the description "Enter the description, work location, and other information about a position.") and "Update Dept Budget Data" (with the description "Identify salaries and FTEs for positions with an approved budget status.").

Current Look and Feel

# LOOK AND FEEL



In HCM 9.1, the navigation toolbar will be positioned at the top of the screen. Selecting a menu option will cause a cascading effect



New Look and Feel

# WHO WILL SUPPORT THIS CHANGE



# PROJECT CHANGE MANAGEMENT



## HCM-EPM Upgrade Executive Leadership Committee

Darlene Wells	Jerry Schildmeyer
Brenda Gerhardstein	Matt Cole
Remard Colston	Dave Schoettmer
Jerry Miller	Deven Mehta

## Change Management Committee

Advisors to OCM

- Tom Cruse
- Teri Decker
- Carolyn Groves
- Jessica Schuster
- Lisa Springer
- Melissa Walpole
- Janet Wampler
- Aaron White
- Jenny Wright

## OCM Team

- Carole Nicolaidis, OAKS OCM Lead
- Julie Anderson, ACN OCM Lead
- Cathy Herron, HRD OCM Lead
- Sheldon Epps, ACN Communication
- Mary Stevens, SME
- Phyllis Gorman, SME
- Molly O'Reilly, DAS Communications
- Stephanie Rankin, Training Lead, HRD

## Change Agent Network

Employee Communication

### 1<sup>st</sup> Level

- Agency Directors

### 2<sup>nd</sup> Level

- HR Directors

### 3<sup>rd</sup> Level

- Core Users
- Help Desks

### 4<sup>th</sup> Level

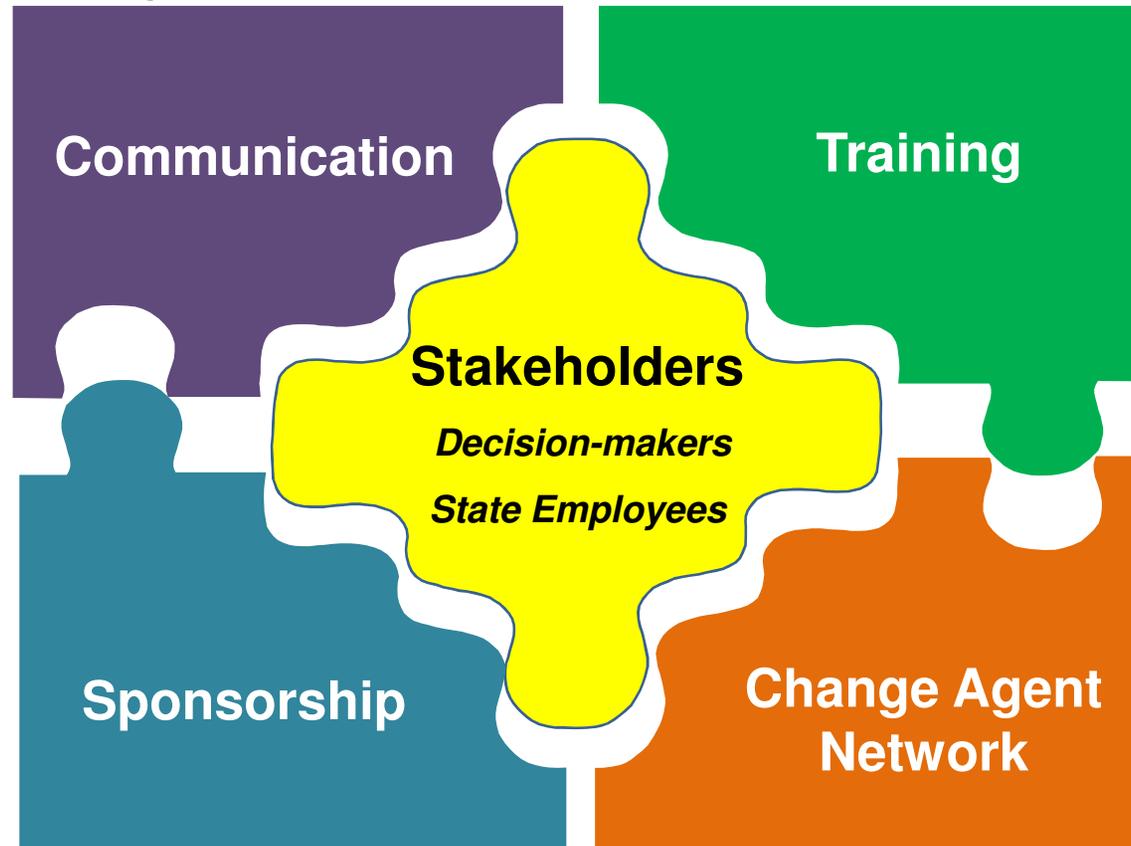
- Employees

# HOW WILL WE SUPPORT OUR STAKEHOLDERS



Multiple communication methods will be used to promote the OAKS HCM Upgrade Project

Training will be provided for OAKS HCM Agency users



Project Sponsors and Agency Leadership will support employees readiness for change

Representatives from each Agency will deliver employee communication

# HOW WILL WE DRIVE COMMUNICATIONS



The Change Agent Network is a central element to successfully drive communications across the State.

Communication to Directors from HR Business Owner

- Explains initiative
- Requests support

Communication to Agency Leadership (HR Management Staff) and Change Agents

HRD Help Desk will be trained and provided with FAQs and resolutions

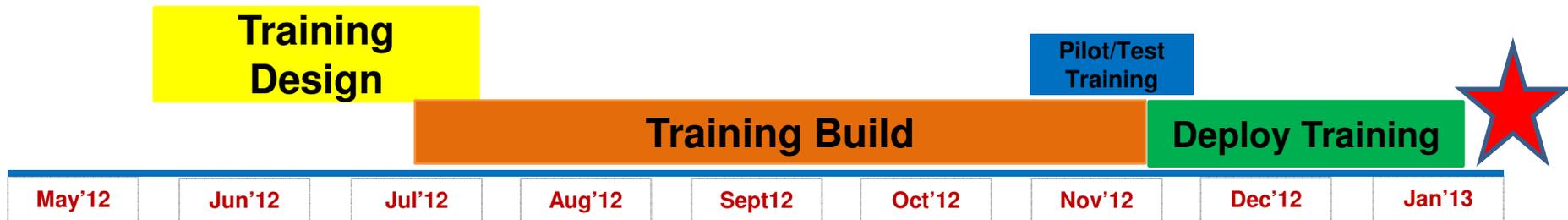


Driving Communications Across the State

# HOW WILL WE DRIVE TRAINING



A variety of Communication and Training approaches will be used to move End Users to *a confident understanding and eventually a mastery* of the system and new processes



## Readiness Activities throughout

- Identify Change Agent Network
- Provide official announcement to HR
- Request assistance from HR Agency Leadership

- Provide project updates through Change Agent Network
- Develop training

- Provide project updates through Change Agent Network
- Offer soft skills & process training
- Prepare to deploy End-User training
- Train the trainer through Change Agent Network

- Deploy training
- Obtain feedback from users
- Coach/Support the Change Agent Network

## NEXT STEPS



- ✓ Identify Change Agents for your Agency (please see sign up sheet)
- ✓ This presentation will be posted for HR Administrators to use when communicating to their Agencies. Notification of the location will be sent once it is posted.
- ✓ Please contact Janis Carter at [Janis.Carter@oaks.state.oh.us](mailto:Janis.Carter@oaks.state.oh.us) if you have any questions

# The Ohio Fiscal Academy



Jason Barnett

OBM Deputy Director, Operations

Robert Cooperman

OBM Training Academy Program Director



OBM

# What it is . . .

- Certification Program: “Ohio Fiscal Professional”
- Increase fiscal literacy of state government
- Coursework and activities—taught and led by those who “do the work”
- Provides participants with skills and knowledge vital to fiscal office leadership and administration



OBM

# Whom it targets . . .

66535	Fiscal Officer 1
66536	Fiscal Officer 2
66537	Fiscal Officer 3
66538	Fiscal Officer 4
66531	Fiscal Specialist 1
66532	Fiscal Specialist 2

63251	Budget Analyst 1
63252	Budget Analyst 2
63255	Budget Analyst Supervisor 1
63256	Budget Analyst Supervisor 2
63221	Budget/Management Analyst 1
63222	Budget/Management Analyst 2
63223	Budget/Management Analyst 3
63224	Budget/Management Analyst 4
63225	Budget/Management Analyst 5
63226	Budget/Management Analyst Sup

***And others!***



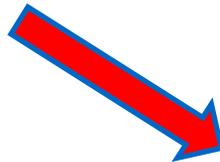
# Cohort Program

- Limited to 25



# OFA Supports State & OBM Goals

**Governor's Goal:**  
Improve customer  
service and access to  
service/care



**OBM Goal:**  
Promote financial literacy  
and increased awareness  
of service offerings within  
state gov't and the general  
public



**OBM**

# The Curriculum: Tier 1

	COURSE	Estimated Delivery Dates
Tier 1	Overview of State Laws and Policies	<b>August 28-September 7, 2012</b>
	Organizing the Fiscal Office	
	The Budget Process	
	Taking the Mystery Out of Financial Reports	
	Procurement for the Fiscal Office	
	Chart of Accounts	



# The Curriculum: Tier 2

	COURSE	Estimated Delivery Dates
Tier 2	Putting a Budget Together	<b>January 7-18, 2013</b>
	Accrual vs. Cash Basis Accounting	
	The HR Connection	
	Introduction to Internal Controls & Auditing	
	Federal Grants Management	



# The Curriculum: Tier 3

	COURSE	Estimated Delivery Dates
Tier 3	Disbursements	<b>April 9-20, 2013</b>
	Allotments	
	Estimating Revenue	
	Intro to SWCAP	
	Debt Management	



# The Curriculum: “Real World Activities” . . .



# Timeline

**May 2012**

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22 Webinar	23	24 Blast email	25	26
27	28 App Available	29	30	31		

**June 2012**

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
	OBM Accepts Applications					
24	25	26	27	28	29	30
	OBM Accepts Applications					

**July 2012**

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
	OBM Determines Cohort					
8	9	10	11	12	13	14
	OBM Determines Cohort					
15	16 Cohort Notified	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



# Timeline (Cont.)

August 2012

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	




September 2012

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						





# Timeline (Cont.)

~ January 2013 ~						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Notes:	

January 2013

April 2013

~ April 2013 ~						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29		Notes:			



OBM

# Questions?



OBM







# Lunch Break

- HR Directors please stop by the front of the stage for a brief meeting before leaving for lunch.
- Please leave notecard questions at the registration table during the break.
- Afternoon Session will begin at 1 p.m.

# Class Plan Optimization

## Overview, Benefits, Tools, and Updates

Office of Workforce Administration

Jessica Schuster, Administrator

614.466.7795

# Class Plan Optimization: Overview

## **Fact:**

70% of the current workforce is in only 30% of the overall classification plan

- Non-elected official classifications account for approximately 2500 classification titles



# Class Plan Optimization: Overview

Spring 12'

- Deleted 200 vacant, Exempt classes
- Deleted 134 vacant, OCSEA Bargaining Unit classes

Summer 12'

- Continue work with OCSEA to delete remaining vacant classifications
- Identify remaining Unions vacant classes -> delete

Fall 12'

- Identify classes with fewer than 5-10 & determine opportunities for reclassification &/or collapse of series'
- Make available a statewide bank of competencies

# Class Plan Optimization: Tools

The screenshot shows the O\*NET OnLine website. At the top, there is a browser address bar with "O\*NET OnLine" and a search bar. Below the browser, the website header includes the O\*NET OnLine logo and a navigation menu with links for "Help", "Find Occupations", "Advanced Search", "Crosswalks", and "O\*NET Sites". A search bar labeled "Occupation Quick Search:" is also present.

The main content area features a large banner with the text "Build your future with O\*NET OnLine." and a "What is O\*NET?" button circled in red. To the right of the banner is a "What's New?" section with a "Learn More" button and a link to "Get O\*NET news by email or RSS". Below the banner is an "Occupation Search" section with a search bar and a "Find It Now at My Next Move" button.

Below the search bar are three main sections: "Find Occupations" (with a "Browse" dropdown), "Advanced Search" (with a "Browse by O\*NET Data:" dropdown), and "Crosswalks" (with an "Apprenticeship" dropdown). To the right of these sections is a "green occupations" section with a "Learn More" and "Search" button.

The bottom of the screenshot shows the Windows taskbar with the Start button, several application icons, and the system tray displaying the time as 1:17 PM.

## About O\*NET

The O\*NET program is the nation's primary source of occupational information. Central to the project is the O\*NET database, containing information on hundreds of standardized and occupation-specific descriptors. The database, which is available to the public at no cost, is continually updated by surveying a broad range of workers from each occupation. Information from this database forms the heart of O\*NET OnLine, an interactive application for exploring and searching occupations. The database also provides the basis for our Career Exploration Tools, a set of valuable assessment instruments for workers and students looking to find or change careers.

The Occupational Information Network (O\*NET) is being developed under the sponsorship of the **US Department of Labor/Employment and Training Administration (USDOL/ETA)** through a grant to the North Carolina Employment Security Commission. [Learn more about the O\\*NET project partners.](#)

About O\*NET Data

O\*NET Applications

Starting Points

## Content Model

### Anatomy of an occupation

Every occupation requires a different mix of knowledge, skills, and abilities, and is performed using a variety of activities and tasks. These distinguishing characteristics of an occupation are described by the [O\\*NET Content Model](#), which defines the key features of an occupation as a standardized, measurable set of variables called "descriptors". This hierarchical model starts with six domains, describing the day-to-day aspects of the job and the qualifications and interests of the typical worker. The model expands to 277 descriptors collected by the O\*NET program, with more collected by other federal agencies such as the [Bureau of Labor Statistics](#).

Explore the [interactive Content Model](#) to see the range of occupational descriptors in the O\*NET database.

## O\*NET-SOC Taxonomy

### A spectrum of occupations

While the Content Model defines the information structure for a single occupation, the [O\\*NET-SOC taxonomy](#) defines the set of occupations across the world of work. Based on the [Standard Occupational Classification](#), the O\*NET-SOC taxonomy currently includes [965 occupations](#) which currently have, or are scheduled to have, data collected from job incumbents or occupation experts. To keep up with the changing occupational landscape, the taxonomy is periodically revised; the last revision was in 2009.

## Data Collection

### Real-world information

The O\*NET-SOC taxonomy defines the occupations, and the Content Model outlines which information is collected; the [Data Collection program](#) brings these frameworks to life with results from the working public. The O\*NET database was initially populated by data collected from occupation analysts; this information is updated by ongoing surveys of each occupation's worker population and occupation experts. This data is incorporated into new versions of the database on an [annual schedule](#) to provide up-to-date information on occupations as they evolve over time. The latest database releases are available from the [Developer's Corner](#).

For more about the data collection, view [sample questionnaires](#) based on the O\*NET surveys, or visit [RTI's O\\*NET site](#) for information from the survey conductors.

## O\*NET® OnLine Desk Aid

O\*NET OnLine is the Occupational Information Network's free Web site for easy access to information on over 900 occupations. View data on tasks, skills, knowledge, abilities, job zones, tools and technology, interests, work styles, work values, and work context. ([onetonline.org](http://onetonline.org))

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### O\*NET OnLine offers 3 report options:

1. **Summary Reports** provide an overview of the selected occupation, focusing on the most important descriptors.
2. **Details Reports** display all descriptors for the selected occupations, and where available, a rating of how important each descriptor is.
3. **Customer Reports** allow you to select 14 different content areas to generate tailored reports about occupations. You can select the type of information (level, importance, frequency) you want displayed.

O\*NET Customer Service: [onet@onetcenter.org](mailto:onet@onetcenter.org)

February - 2012

# Class Plan Optimization: Tools

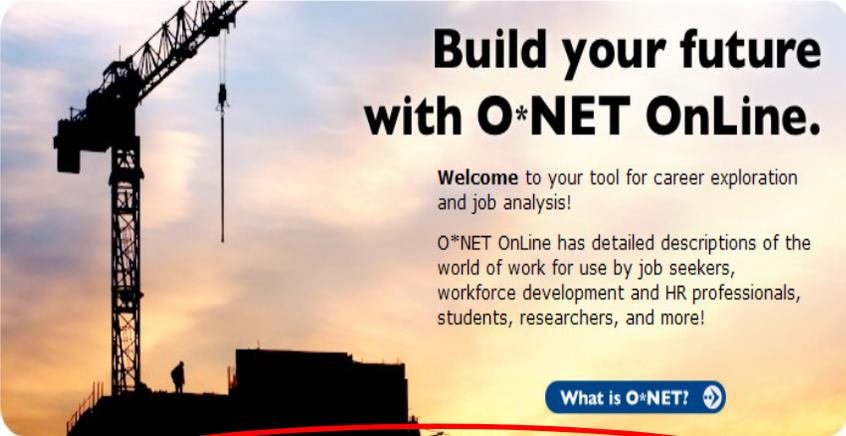
File Edit View Favorites Tools Help

★ Favorites | http--das.ohio.gov... | Suggested Sites | Free Hotmail | Upgrade Your...

O\*NET OnLine

**O\*NET OnLine** Occupation Quick Search:

Help Find Occupations Advanced Search Crosswalks O\*NET Sites



## Build your future with O\*NET OnLine.

Welcome to your tool for career exploration and job analysis!

O\*NET OnLine has detailed descriptions of the world of work for use by job seekers, workforce development and HR professionals, students, researchers, and more!

[What is O\\*NET?](#)

### What's New?

My Next Move launches for job seekers

[Learn More](#)

Get O\*NET news by [email](#) or [RSS](#).

### I want to be a...

Start the career you've dreamed about, or find one you never imagined.

[Find It Now at My Next Move](#)

### Occupation Search

Keyword or O\*NET-SOC Code:

### Find Occupations

Browse groups of similar occupations to explore careers. Choose from industry, field of work, science area, and more.

Bright Outlook

### Advanced Search

Focus on occupations that use a specific tool or software. Explore occupations that need your skills.

Browse by O\*NET Data:

### Crosswalks

Connect to a wealth of O\*NET data. Enter a code or title from another classification to find the related O\*NET-SOC occupation.

Apprenticeship



### green occupations

The green economy is changing tasks, skills, and jobs across the country. Discover important information for over 100 occupations going green.

[Learn More](#) [Search](#)

Done

start | Internet | 100%

Inbox - Micro... | Microsoft Pow... | O\*NET OnLin... | desk\_aid[1].p...

1:17 PM

Quick Search - Windows Internet Explorer

http://www.onetonline.org/find/quick?s=teacher

weather channel

File Edit View Favorites Tools Help

★ Favorites | ★ New Tab | http--das.ohio.gov... | Suggested Sites | Free Hotmail | Upgrade Your... | Quick Search

## Quick Search for: teacher

### Occupations matching "teacher"

The search results are listed in a rank order that is calculated on the [relevance](#) of the occupational title, alternate titles, description, tasks, and detailed work activities associated with the keyword you entered.

Select the **Relevance Score** to view the specific items matched by your search within the occupation.

Relevance Score	Code	Occupation
100	25-9041.00	<a href="#">Teacher Assistants</a>  <b>Bright Outlook</b>
98	25-2051.00	<a href="#">Special Education Teachers, Preschool</a>
98	25-2052.00	<a href="#">Special Education Teachers, Kindergarten and Elementary School</a>
98	25-2053.00	<a href="#">Special Education Teachers, Middle School</a>
98	25-2054.00	<a href="#">Special Education Teachers, Secondary School</a>
98	25-2012.00	<a href="#">Kindergarten Teachers, Except Special Education</a>
98	25-2021.00	<a href="#">Elementary School Teachers, Except Special Education</a> 
97	25-2022.00	<a href="#">Middle School Teachers, Except Special and Career/Technical Education</a> 
97	25-2023.00	<a href="#">Career/Technical Education Teachers, Middle School</a>
97	25-2031.00	<a href="#">Secondary School Teachers, Except Special and Career/Technical Education</a> 
97	25-2032.00	<a href="#">Career/Technical Education Teachers, Secondary School</a>
97	25-1123.00	<a href="#">English Language and Literature Teachers, Postsecondary</a>

Internet 150%

start | Inbox - Micro... | OAKS\_HCM\_... | Quick Search ... | HRC2012.pptx | Desktop 2:28 PM

Architecture and Engineering  
 Arts, Design, Entertainment, Sports, and Media  
 Building and Grounds Cleaning and Maintenance  
 Business and Financial Operations  
 Community and Social Service  
 Computer and Mathematical  
 Construction and Extraction  
 Education, Training, and Library  
 Farming, Fishing, and Forestry  
 Food Preparation and Serving Related  
 Healthcare Practitioners and Technical  
 Healthcare Support  
 Installation, Maintenance, and Repair  
 Legal  
 Life, Physical, and Social Science  
 Management  
**Military Specific**  
 Office and Administrative Support  
 Personal Care and Service  
 Job Production  
 Protective Service  
 Sales and Related  
 Transportation and Material Moving  
 All Occupations

Occupation Quick Search:

ne

ormed, skills, education, training, and credentials.

Go

Help Find Occupations Advanced Search Crosswalks Share O\*NET Sites

Send comments or questions to [O\\*NET Info](#).  
[Rate this Page](#) • [Link to Us](#) • [Privacy Statement](#) • [Disclaimer](#)

Military Specific Occupations - Windows Internet Explorer

http://www.onetonline.org/find/family?i=550g=Go

Military Specific Occupations

### Browse by Job Family

Job Families are groups of occupations based upon work performed, skills, education, training, and credentials.

Military Specific Go

Military Specific Save Table (XLS/CSV)

Sort by: Code Occupation ▲

55-3011.00	<a href="#">Air Crew Members</a>
55-1011.00	<a href="#">Air Crew Officers</a>
55-1012.00	<a href="#">Aircraft Launch and Recovery Officers</a>
55-3012.00	<a href="#">Aircraft Launch and Recovery Specialists</a>
55-3013.00	<a href="#">Armored Assault Vehicle Crew Members</a>
55-1013.00	<a href="#">Armored Assault Vehicle Officers</a>
55-3014.00	<a href="#">Artillery and Missile Crew Members</a>
55-1014.00	<a href="#">Artillery and Missile Officers</a>
55-1015.00	<a href="#">Command and Control Center Officers</a>
55-3015.00	<a href="#">Command and Control Center Specialists</a>
55-2011.00	<a href="#">First-Line Supervisors of Air Crew Members</a>
55-2013.00	<a href="#">First-Line Supervisors of All Other Tactical Operations Specialists</a>

25-9041.00 - Teacher Assistants - Windows Internet Explorer

http://www.onetonline.org/link/summary/25-9041.00

File Edit View Favorites Tools Help

25-9041.00 - Teacher Assistants



**O\*NET OnLine**  
A proud partner of the **americanjobcenter** network

Occupation Quick Search:

Help Find Occupations Advanced Search Crosswalks Share O\*NET Sites

## Summary Report for: 25-9041.00 - Teacher Assistants

Updated 2011  
Bright Outlook

Perform duties that are instructional in nature or deliver direct services to students or parents. Serve in a position for which a teacher has ultimate responsibility for the design and implementation of educational programs and services.

**Sample of reported job titles:** Teacher Assistant, Paraprofessional, Instructional Assistant, Special Education Teaching Assistant, Paraeducator, Teacher Aide, Special Education Paraprofessional, Teaching Assistant, Educational Technician, Instructional Aide

View report: **Summary** Details Custom

[Tasks](#) | [Tools & Technology](#) | [Knowledge](#) | [Skills](#) | [Abilities](#) | [Work Activities](#) | [Work Context](#) | [Job Zone](#) | [Education](#) | [Interests](#) | [Work Styles](#) | [Work Values](#) | [Related Occupations](#) | [Wages & Employment](#) | [Additional Information](#)

### Tasks

- Provide extra assistance to students with special needs, such as non-English-speaking students or those with physical and mental disabilities.
- Supervise students in classrooms, halls, cafeterias, school yards, and gymnasiums, or on field trips.
- Tutor and assist children individually or in small groups to help them master assignments and to reinforce learning concepts presented by teachers.
- Enforce administration policies and rules governing students.

Internet 150%

start | Inbox - Micro... | OAKS\_HCM\_... | 25-9041.00 - ... | HRC2012.pptx | Desktop 2:31 PM

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Lost Your Job?

Get help at these sites

- mySkills myFuture
- My Next Move
- Worker ReEmployment
- Census Worker ReEmployment

Print | Email This Page | FAQs | Rate This Page

Share | Topics A to Z

Site Search

State Job Banks

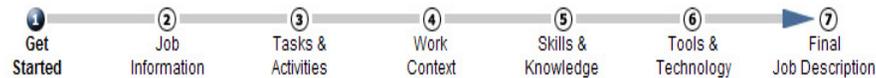
More Resources: America's Career Infonet

Explore Careers : [Salary + Benefits](#) : [Education + Training](#) : [Job Search](#) : [Resumes + Interviews](#) : [People + Places to Help](#)  
[browse occupations](#) : [explore green careers](#) : [help a job seeker](#) : [salary info](#) : [write job descriptions](#) : [military transition](#) : [disaster recovery services](#)

Explore Careers

[Home](#) > [Career InfoNet](#) > [Career Tools](#) > [Job Description Writer](#)  
 America's Career InfoNet

# Job Description Writer



## GET STARTED

Use the Job Description Writer to build a meaningful job description. Start by selecting an occupation below, and add details as you continue through the tool. You will be prompted with statements of tasks, work activities, work context, skills and knowledge, and tools and technology from O\*NET. Please note that while these statements can form the basis of a job description, employers are required to consider [job accommodations](#) for workers with disabilities.

Your content is retained as you move through the tool. Use the navigation buttons or the progress bar above to modify as you go. Options to save your job description are available at the end of the tool.

Start the Job Description Writer by selecting one of the options below:

Keyword/Code Search: Enter a keyword or O\*NET-SOC Code to find an occupation.



Inbox - Micro... Microsoft Pow... Search Occup... Toolkit\_scee... desk\_aid[1].p...

# Ohio Performance Review System (OPRS)

## Overview, Benefits, Tools, and Updates

Office of Workforce Administration

Performance Management

Phyllis Gorman, Manager

614.466.0521

# OPRS: Overview

- New Format Introduces:
  - Purpose of Organization and Position statements
  - Competencies at the State level and optional Agency and Position level
  - Updated Rating System for ease in application

**EMPLOYEE INFORMATION**

Name Rodney Roosevelt	Employee ID 1000001
Agency Rehabilitation & Corrections	Dept ID DRC230100 Desc Chillicothe Correctional Institution
Job Code 46531	Supervisor Shirley Johnson
Position 21111111 Number	Supervisor's 23333333 Position Number
Review Period 04/01/2011 to 04/01/2012	Review Deadline 04/01/2012

**TYPE OF REVIEW**

Click one:  Annual  Probationary  Other

**PURPOSE OF ORGANIZATION AND POSITION**

*Organizational vision, mission, and Organizational goals and objectives:*

**Agency Mission:** The Ohio Department of Rehabilitation and Correction protects and supports Ohioans by ensuring that adult felony offenders are effectively supervised in environments that are safe, humane, and appropriately secure. In partnership with communities, we will promote citizen safety and victim reparation. Through rehabilitative and restorative programming, we seek to instill in offenders an improved sense of responsibility and the capacity to become law-abiding members of society.

**Agency Strategies & Goals:**

1. All adults convicted of felonies for which the statutory minimum is at least six months come into the state's prison system, which is under the supervision of the Ohio Department of Rehabilitation and Correction.
2. Many convicted felons are not, however, sent to prison. Instead, they are supervised in the community through probation or other community correction alternatives.
3. Convicted felons who have served a specific amount of time in prison can be, if eligible, placed back into the community through a system called Parole. Parole is a period of supervision prior to full release from the state's correctional system. This function, too, belongs to the Ohio Department of Rehabilitation and Correction.

***Purpose of the position:*** How does this position align with the organization? Tie the contributions of this position to the agency's goals and objectives.

Correction Officers (CO's) are full performance level contributors. CO's work under general supervision & requires considerable knowledge of custody, safety & security measures for detention of adult felons in controlled environments in order to maintain discipline, order & security.

# Competencies

- **What's a competency?**
  - *The observable behaviors that demonstrate an individual's knowledge, skill, and ability*



# OPRS:

- 1. Communication*
- 2. Customer Focus*
- 3. Organizational Commitment*

# OPRS: Rating Systems

Three (3) point scale for:

- Competencies
- Performance Expectations
- Goals & Objectives



Five (5) point scale for:

- Overall Score

# OPRS: Rating System

OVERALL PERFORMANCE RATINGS	
5. OUTSTANDING	CONSISTENTLY <u>EXCEEDS</u> EXPECTATIONS ON <u>ALL</u> EVALUATION FACTORS
4. EXCEEDS EXPECTATIONS	OVERALL <u>HIGH PERFORMANCE</u> FREQUENTLY <u>EXCEEDS</u> EXPECTATIONS ON <u>MANY</u> FACTORS
3. MEETS EXPECTATIONS	CONSISTENTLY <u>MEETS</u> THE REQUIREMENTS OF THE JOB IN <u>ALL</u> ASPECTS
2. NEEDS IMPROVEMENT	SOMETIMES ACCEPTABLE, BUT <u>NOT CONSISTENT</u> ; NEEDS IMPROVEMENT TO MEET EXPECTATIONS
1. DOES NOT MEET EXPECTATIONS	<u>DOES NOT MEET MINIMUM STANDARDS</u> OF PERFORMANCE
ADDITIONAL COMMENTS:	

# OPRS to ePerformance

- OPRS to OAKS ePerformance via MyOhio page
- Tool rolls-out in January 2013 for ALL employees
- Provides ALL an electronic workflow management system
- Mechanism for Standardized Reporting / Trending

# ePerformance: Benefits

## System Features include:

- Spell check
- Language checker
- Ability to attach documents (e.g., thank you's)
- Allows programming to move to Annual Cycles starting each quarter for Exempt employees
- **Bargaining unit employees will maintain dates consistent with Anniversary dates**

# ePerformance: Next Steps

- Next Steps
  - Communicate
  - Design
  - Build
  - User Acceptance Testing
  - Training



# Practical Applications of Payroll Reporting

Office of Human Capital Management and HR Agency Support

Janet Wampler, State Payroll Manager

614.728.4101

# National Payroll Week

**September 3-7, 2012**

National Payroll Week celebrates the hard work by America's 156 million wage earners and the payroll professionals who pay them. Together, through the payroll withholding system, they contribute, collect, report and deposit approximately \$1.7 trillion, or 71.8%, of the annual revenue of the U.S. Treasury.

# Payroll Pitfalls

One of the Most common is not taking the opportunity to embrace the process of a mistake

- Mistakes Do Happen
- Shouldn't be repeated
- Use as Learning Moment
- Utilize Tools

# CYA

- Change Your Attitude-Embrace Process of Mistakes
- Utilize Reporting Tools
  1. Understand Mechanics of Reports
  2. Understand Why/How to Use Reports
  3. Implement Workflow
  4. Create Checklist

# Mechanics Of Reports

- Know the Tables the Data Pulls From
- Know When Updates are Ran
- Understand the Parameters
- Understand the Fields
- Ask if You Don't Know or Understand

# Understand Why to Use

- Validation/Accuracy
- Capturing Issues
- Auditing
- Embrace Process of Mistakes
- Meet Mission Statement

# Understand How to Use

- Create your Baseline
- Sort/Filter
- Merge for Compare

# Implement Workflow

- Determine What makes Sense
- Make Schedule for Each Day
- Develop a Payroll Strategy
  1. Determine Current Performance
  2. Desired Objective
  3. Establish and Align Tasks
  4. Develop/Engage Communication Plan

# Create Checklist

- Portal Checklist
- Own Internal
- Review DAS Reports

# Payroll Rocks!!!

Remember:

“Success belongs to those that believe in it the most!”

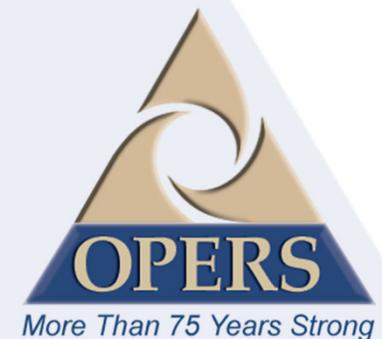


**Break**  
**2:15 – 2:30**

# **OPERS Proposed Pension Plan and Health Care Changes**

---

**Call To Action: Legislation is Needed in 2012**





## **Learning Objectives**

- **How Did We Get Here?**
- **What Have We Proposed?**
- **What Happens Next?**
- **What Is Our Action Plan?**

## Learning Objectives

- **How Did We Get Here?**
  - *History and Funding Challenges*
- What Have We Proposed?
- What Happens Next?
- What Is Our Action Plan?



## **Historical Change**

### **Increased Life Expectancies**

Men and women are living approximately 10 years longer today compared to statistics from the 1950's.

### **Growth in Retirees**

1967 – OPERS had almost 31,500 retirees.

2011 – OPERS had over 184,900 retirees.

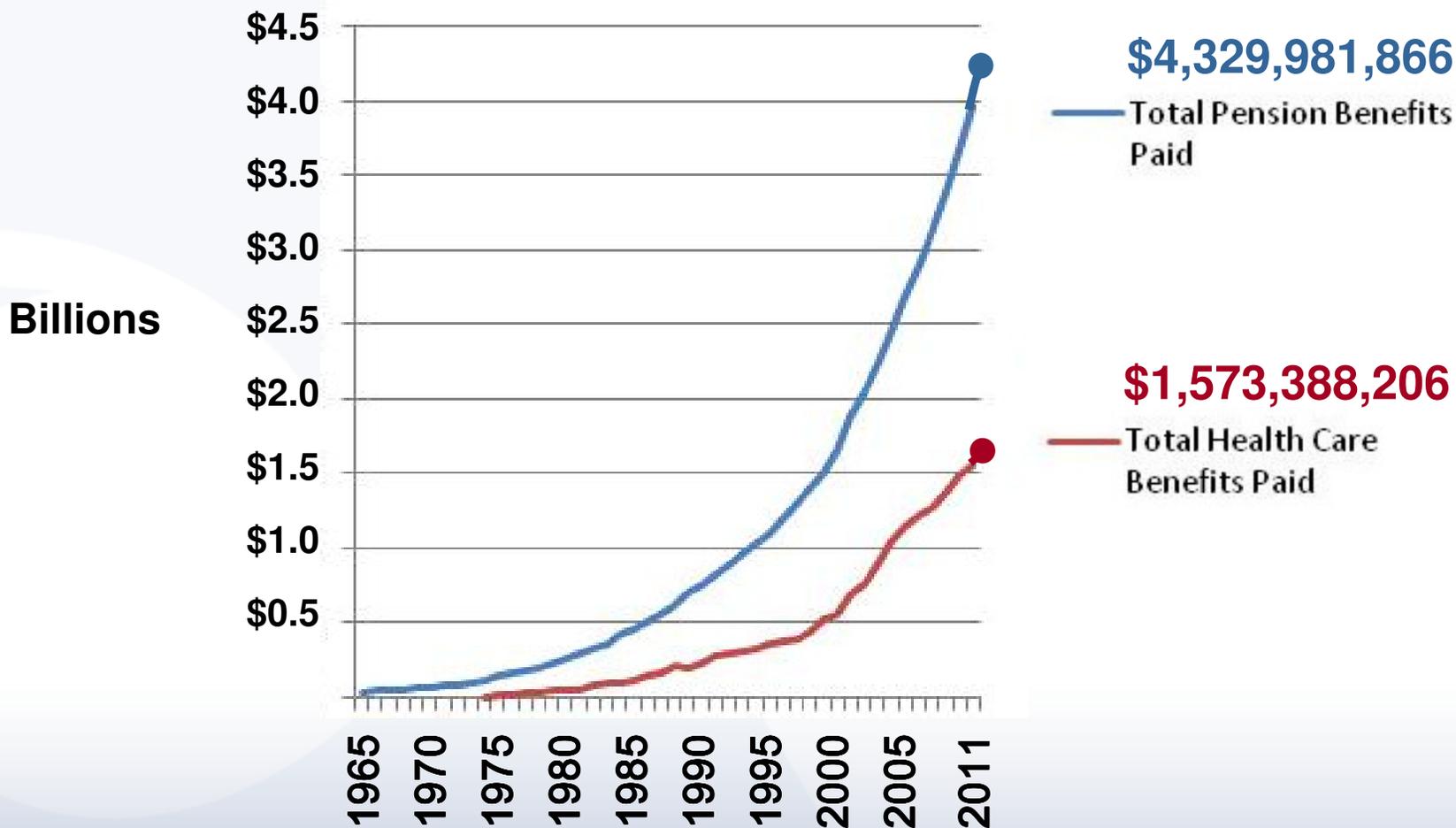
2058 – Projections indicate we will have over 370,000.

### **Return on Investments**

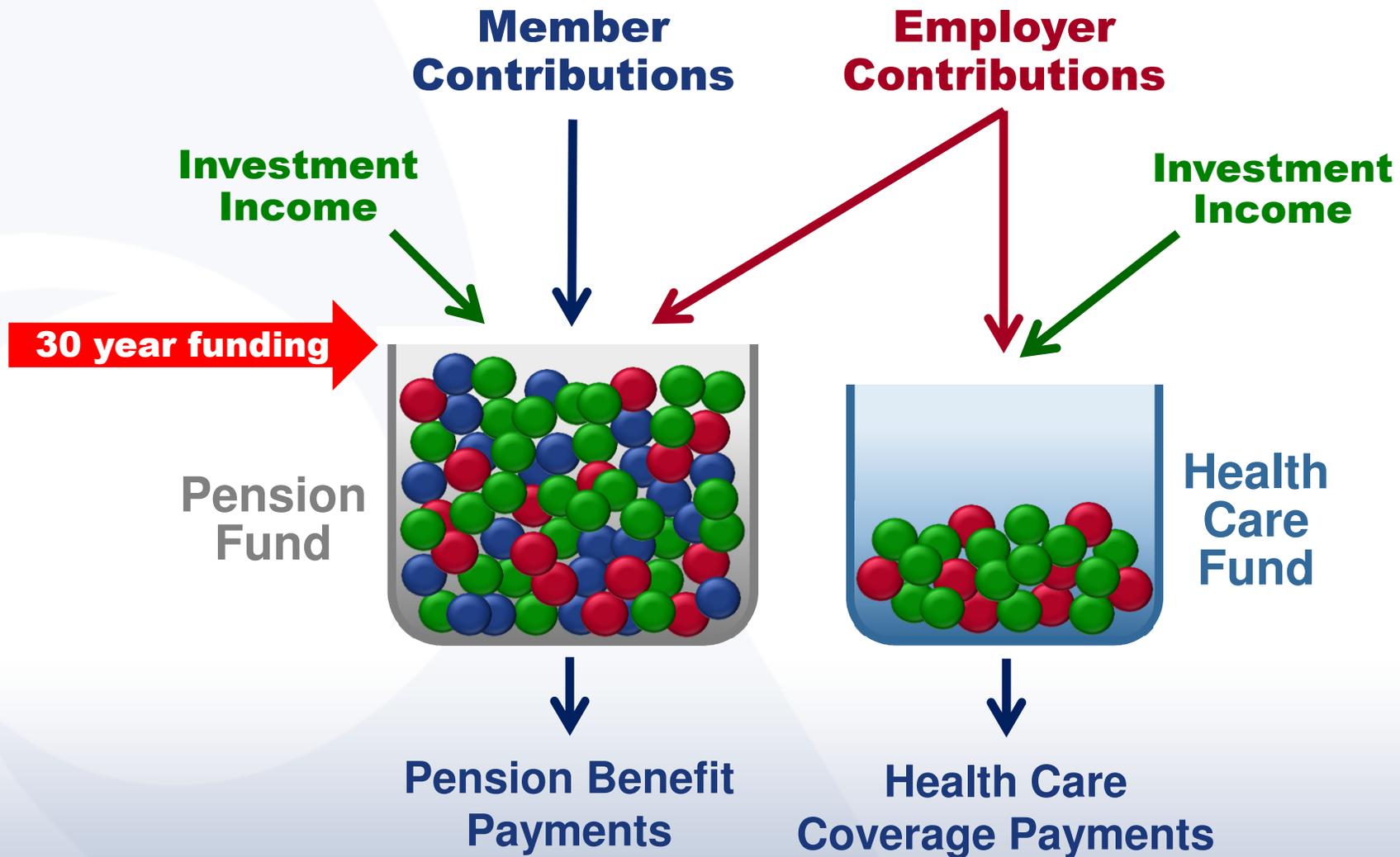
2008 – Economic downturn



# The Impact on Funding



# An Illustration of Funding



## Recent Changes In Key Funding Measures



	2007	2008	2009	2010
Funded Ratio	96%	75%	75%	76%
Amortization Years	14	30 *	30*	29*
Health Care Solvency	31 years	11 years	11 years	11 years

*\* In order to stay within 30 years of funding, OPERS adopted a schedule to decrease health care funding down to 0% by 2014, which means the assets in the healthcare fund would run out within approximately 11 years.*

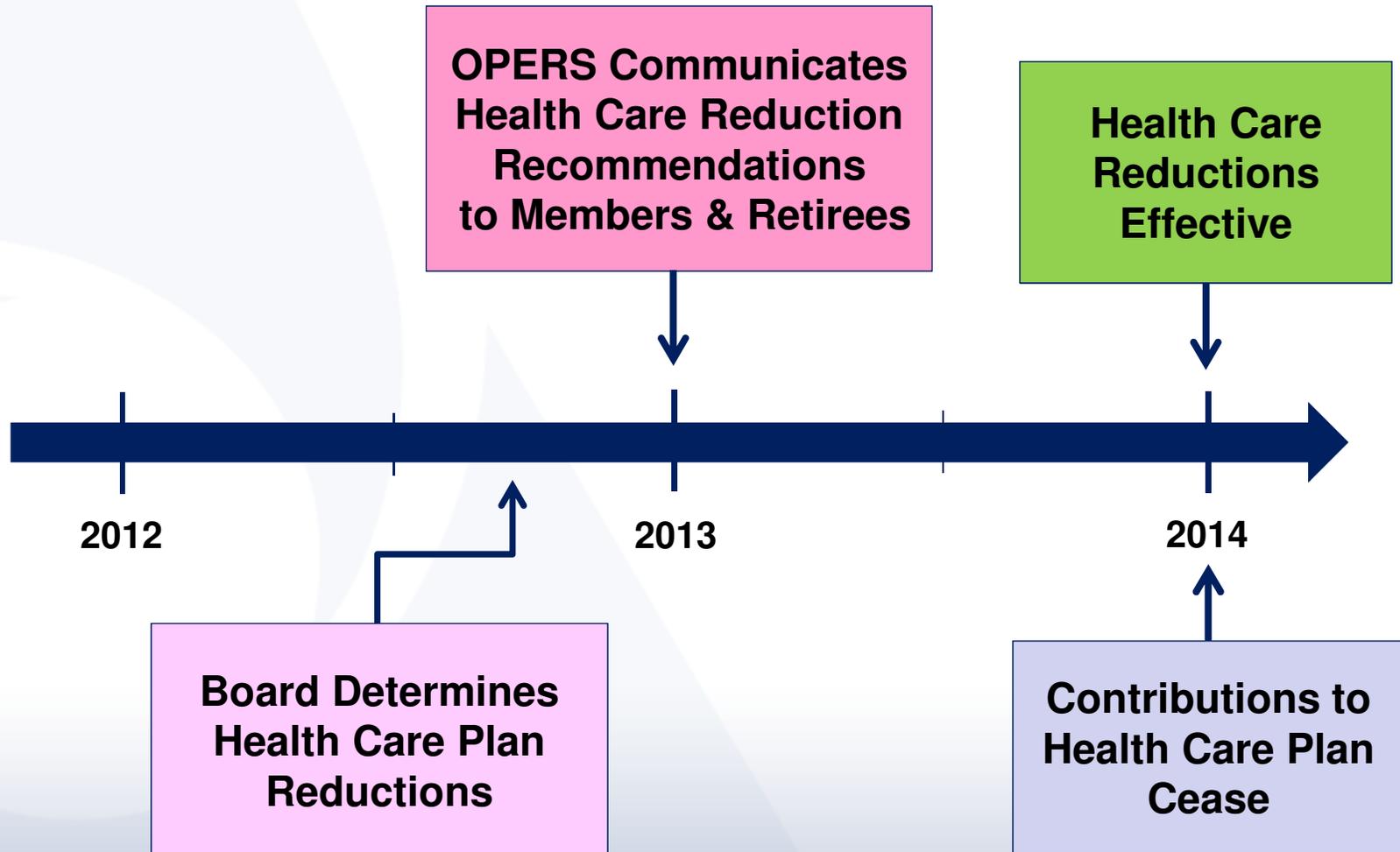
# Contribution Rate Allocation Changes To Retain 30-Year Funding



	Pension	Health Care	Total
2009	8.5%	5.5%	14.0%
2010	9.0%	5.0%	14.0%
2011	10.0%	4.0%	14.0%
2012	10.0%	4.0%	14.0%
2013	13.0%	1.0%	14.0%
2014 and beyond	14.0%	0.0%	14.0%

The goal is to restore health care funding to a 4% level with the passage of the pending legislation.

# The Impact of Delay



Without passing legislation in 2012 there are 2 scenarios that could be pursued:

## Without Pension Legislation

### Scenario 1

Maintaining current health care plan and spend down fund in 8 years

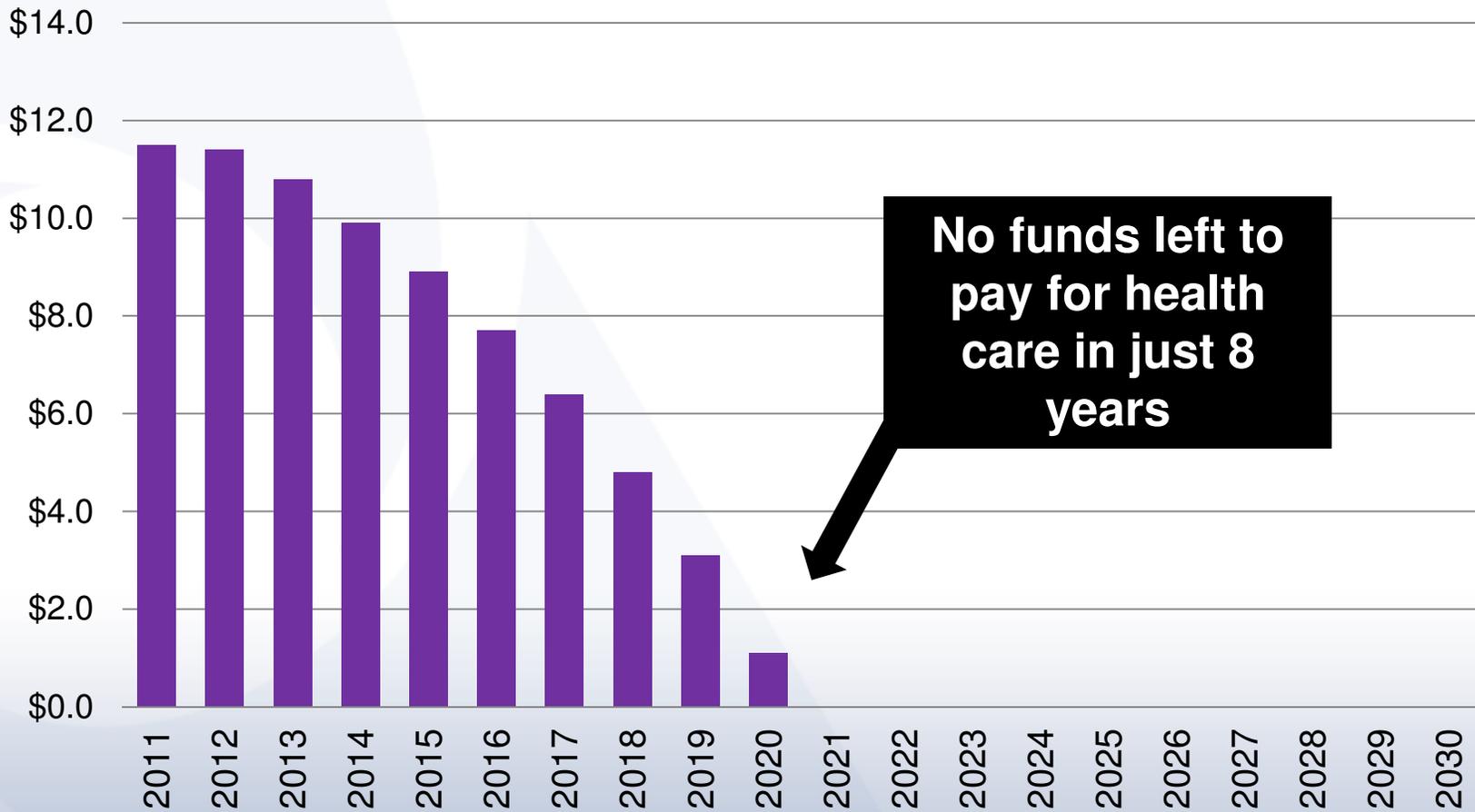
### Scenario 2

Change health care to what is legislatively required only

# Changes Without Legislation – Scenario 1



## Keep current health care plan *Projected Value in Billions*



## **Changes Without Legislation – Scenario 2**



**Change health care plan to what is legislatively required only**

**Without passage of pension legislation there will be no more funding for Health Care as early as 2014**

- To preserve the health care fund, OPERS would only use the health care fund investment income to pay costs.
- Drastic reductions will be made to the current health care plan – cutting the program by nearly 70% to approximately \$500 million.

## **Changes Without Legislation – Scenario 2**



**OPERS would only be able to provide coverage that is legislatively required.**

**That includes:**

- **Medicare Part A equivalent coverage**
- **Medicare Part B Reimbursement set by the Board**

**In this scenario, there will not be health care for 224,000 OPERS retirees, spouses and children as early as 2014.**

## Progress Check ✓



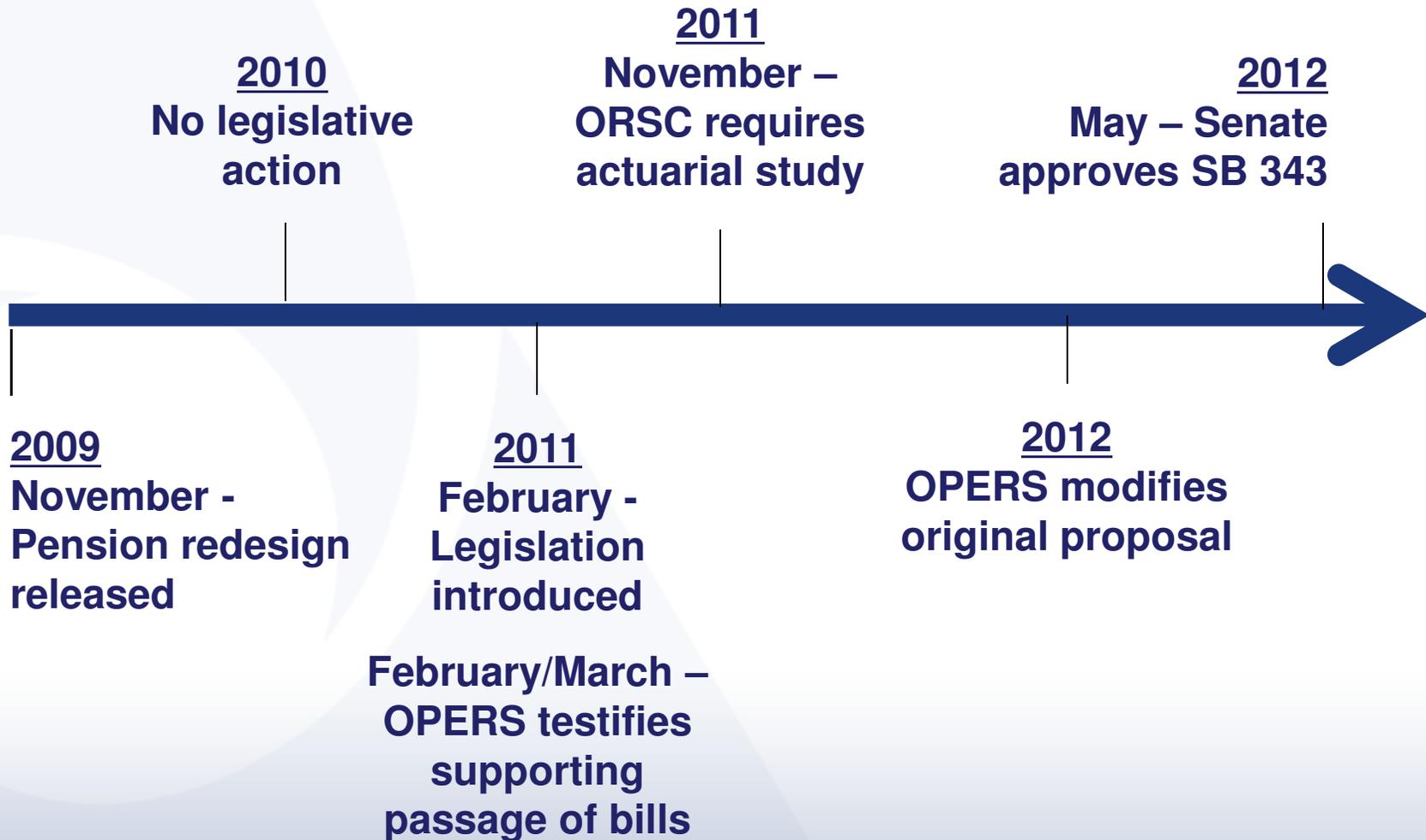
Without passage of the legislation in year \_\_\_\_\_, OPERS would need to reduce health care spending by approximately 70%.

**2012**

## Learning Objectives

- How Did We Get Here?
- **What Have We Proposed?**
  - *Pension Plan Redesign*
- What Happens Next?
- What Is Our Action Plan?

# Legislative Timeline



# Goal - Finding The Right Balance



## More Than Needed

May cause  
undue hardship  
on members



## Less Than Needed

May create need  
for more drastic  
changes later

Key to Achieving Balance → Incremental Changes Over Time

# Major Components of Pension Redesign and Health Care Changes



- **Age & Service Eligibility**
- **Age & Service Reduction Factors**
- **Benefit Formula**
- **Final Average Salary (FAS)**
- **Cost of Living Adjustment (COLA)**

# Proposed Pension Redesign



## Age & Service Eligibility

	Current Eligibility	Board Recommended
State/Local Division	<p><b>Unreduced:</b> any age/30 yrs of service or age 65/5 yrs</p> <p><b>Reduced:</b> age 55/25 yrs of service or age 60/5 yrs</p>	<p><b>Unreduced:</b> age 55/32 yrs of service or age 67/5 yrs</p> <p><b>Reduced:</b> age 57/25 yrs of service or age 62/5 yrs</p>
Law Enforcement	<p><b>Unreduced:</b> age 48/25 yrs of service or age 62/15 yrs</p> <p><b>Reduced:</b> age 52/15 yrs</p>	<p><b>Unreduced:</b> age 52/25 yrs of service or age 64/15 yrs</p> <p><b>Reduced:</b> age 48/25 yrs or age 56/15 yrs</p>
Public Safety	<p><b>Unreduced:</b> age 52/25 yrs of service or age 62/15 yrs</p> <p><b>Reduced:</b> age 48/25 yrs or age 52/15 yrs</p>	<p><b>Unreduced:</b> age 56/25 yrs or age 64/15 yrs</p> <p><b>Reduced:</b> age 52/25 yrs or age 56/15 yrs</p>

# Proposed Pension Redesign



## Age & Service Reduction Factors

Current Reduction Factors	Board Recommended
Set in statute at 75% - 100% of base benefit based on age and years of service at retirement	Established by actuary

# Proposed Pension Redesign



## Benefit Formula

Current Formula	Board Recommended
<b>State/Local</b> <i>Unreduced – 2.2% x FAS for first 30 years of service, 2.5% thereafter</i>	<b>State/Local</b> <i>Unreduced – 2.2% for all years of service up to 35, 2.5% thereafter</i>
<b>Law</b>	<b>Law</b> No change to benefit formula
<b>Public Safety</b>	<b>Public Safety</b> No change in benefit formula

## Final Average Salary (FAS)

Current FAS	Board Recommended
3-year FAS	5-year FAS

## **Proposed Pension Redesign - *Group Concept***



The Board has recommended the following transition plan.

### **Group A**

Must be eligible to retire within five years after the effective date of the legislation.

### **Group B**

Must be eligible to retire within 10 years after the effective date of the legislation or have attained 20 years of service credit prior to the effective date.

### **Group C**

All others and new hires after the effective date of the legislation.

To be counted toward determining group eligibility, all service purchase must be completed during the applicable transition period.

## Proposed Pension Redesign - *Group Impact*



The Board has recommended the following transition plan.

### Group A

Grandfathered under current plan design except for COLA provision.

### Group B

Grandfathered under other current plan design with three exceptions.

- COLA will be based on the annual change in the CPI.
- Early retirement with a reduced benefit will be subject to new actuarially neutral age reduction factors.
- **Retirement eligibility criteria slightly modified**

### Group C

All elements of the new plan design apply.



# Age & Service Eligibility

UNREDUCED	Group A		Group B		Group C	
	Age	Service	Age	Service	Age	Service
State/Local	Any	30	52	31	55	32
			Any	32		
	65	5	66	5	67	5
Law Enforcement	48	25	50	25	52	25
	62	15	64	15	64	15
Public Safety	52	25	54	25	56	25
	62	15	64	15	64	15
Law and Public Safety (public safety benefit)	52	25	54	25	56	25

REDUCED	Group A		Group B		Group C	
	Age	Service	Age	Service	Age	Service
State/Local	55	25	55	25	57	25
	60	5	60	5	62	5
Law Enforcement	52	15	52	15	56	15
	N/A	N/A	48	25	48	25
Public Safety	52	15	52	15	56	15
	48	25	48	25	52	25
Law and Public Safety (public safety benefit)	48	25	48	25	52	25

# Proposed Pension Redesign



## Cost of Living Adjustment (COLA)

Current COLA	Board Recommended
Percentage – 3% Simple COLA  COLA begins 12 months after retirement	COLA = CPI, not to exceed 3%  COLA begins 12 months after retirement

# COLA Transition



	Effective Date of Legislation	End of 5 year transition period
<b>Current retirees</b>	3% (no change)	3% (no change)
<b>Members retiring with effective dates during 5 yr transition period</b>	3% until end of 5 yr transition period following legislation  <i>Legislation would remove vesting in 3% COLA effective immediately</i>	All COLAs after end of 5 yr transition period equal to CPI not to exceed 3%
<b>Members retiring after end of 5 yr transition period</b>	N/A	All COLAs equal to CPI not to exceed 3%

# Other Board Proposed Components



## Not subject to the transition plan:

<b>Proposed Changes</b>	<b>Applies to All Groups</b>
Purchase of service credit actuarially neutral	
Minimum Earnable Salary	
Eliminate two alternative benefit calculations	
Anti-spiking provision	
Disability program changes	
Intersystem transfers	
Membership determinations	
Limit retroactive retirement benefits to 90 days	
Universal beneficiary designation	
Corrective Changes	

# **OPERS Board Authority**



**OPERS Board is seeking authority over the following:**

- **Enhanced refunds**
- **Health care eligibility**
- **Medicare B Reimbursement**
- **Combining service credit among the OPERS retirement plans**
- **Establishing the mitigating rate**

## Progress Check ✓



If a member retires two and a half years after the effective date of the legislation, will he receive a fixed 3% Cost of Living Adjustment (COLA)?

**Yes, for a limited period**

***This member would receive a fixed 3% for two years, then transition to the CPI based model.***



## Learning Objectives

- How Did We Get Here?
- What Have We Proposed?
- **What Happens Next?**
  - *Health Care Changes*
- What Is Our Action Plan?

# Health Care Changes



With legislation passing in 2012 there are 2 scenarios that could be pursued:

## With Pension Legislation

### Scenario 1

Keep current health care plan and spend down fund in 14 years

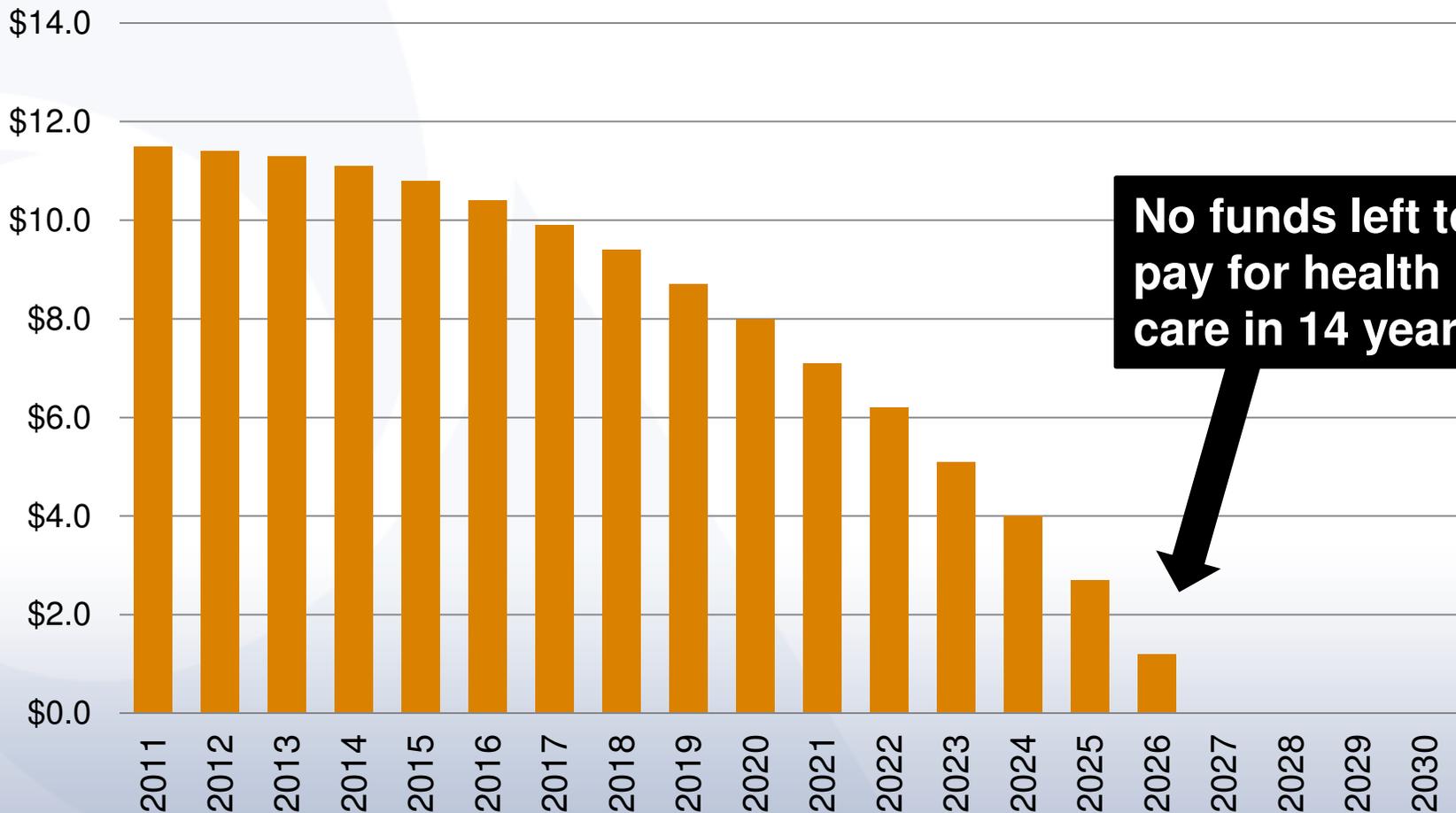
### Scenario 2

Change to a new Health Care Preservation Plan

# Changes With Legislation – Scenario 1



## Keeping the current health care plan *Projected Value in Billions*



## Changes With Legislation – Scenario 2



### Adopt a Health Care Preservation Plan

- The percentage of the employer contribution required to fund our current health care program is 7.6%
- The 7.6% required to maintain the health care program is not sustainable given our current challenges
- With passage of pension legislation, OPERS will be able to allocate 4% of the employer contribution to fund health care
- It still requires significant changes to the health care program

## **Health Care Preservation Plan Objective**



**The Board's objective is to develop a health care plan that can be funded with 4% of employer contributions to preserve health care for career employees.**

- **The board is currently deliberating on what the new plan will look like**
- **A final decision is expected by this fall**
- **The following slides outline some of the components being discussed**

# Health Care Changes – *Eligibility*



## Board Discussions

Minimum Retiree Age 60  
**(future retirees)**

Access with 20 years of service credit  
**(future retirees)**

No allowance or access for spouses under age 65  
**(current and future retirees)**

Access to health care with no allowance for spouses covered under Medicare **(current and future retirees)**

# Health Care Changes – Cost



## Board Discussions

**Restructured allowance based on years of service and age  
(current and future retirees)**

**More out of pocket costs for premiums and covered services  
(current and future retirees)**

**Reduce or eliminate Medicare B reimbursement  
(current and future retirees)**

# Health Care Changes – Access



## Board Discussions

Spouses without Medicare	No access for spouses under age 65 <b>(current and future retirees)</b>
Spouses with Medicare	Access with no allowance <b>(current and future retirees)</b>
Dependent Children	Access with allowance equal to 50% of retiree's allowance <b>(current and future retirees)</b>
Disability Recipients	Access with allowance limited to first 5 years of disability retirement unless <b>approved for federal program</b>

# Health Care Changes – Plans



## Board Discussions

<b>Non-Medicare</b>	<b>Reduce the number of coverage levels (current and future retirees)</b>
<b>Medicare Recipients</b>	<b>Introduce a new, personalized plan model</b> <ul style="list-style-type: none"><li>• <b>More choices, greater affordability</b></li><li>• <b>Allowance based on years of service and age</b></li></ul> <b>(current and future retirees)</b>

# Health Care Changes – Personalized Plan Model



## Progress Check ✓



If legislation passes and 4% of the employers' contributions are used to fund health care, there will be no change to coverage.

A.) True

B.) False

**OPERS will still need to make significant reductions, but the goal is to maintain a meaningful health care plan.**



## Learning Objectives

- How Did We Get Here?
- What Have We Proposed?
- What Happens Next?
- **What Is Our Action Plan?**
  - *OPERS Needs Your Support*

# **Call to Action: OPERS Needs Your Support!**



## *What Is Our Action Plan?*

- **Communicate the value OPERS provides the state of Ohio and the need for retirement security and health care coverage.**
- **Obtain support from all interested parties.**
- **Follow legislative hearings and provide testimony.**
- **Encourage active and retired members and employers to testify and contact their legislative representatives.**
- **Keep OPERS membership updated**
  - **PERSpective (the OPERS blog), Facebook, Twitter**
  - **[www.opers.org](http://www.opers.org)**

# **Call to Action: OPERS Needs Your Support!**



## *What Can You Do?*

**Support OPERS recommended changes to help us preserve your benefits**

- **Sign and mail postcard you received from OPERS**
- **Go online to [www.opers.org](http://www.opers.org) and sign the online petition**
- **Write a letter and return to OPERS**
- **Keep your email address current online for updates**

# Call to Action: OPERS Needs Your Support!



## *Stay Informed*

- Follow legislative hearings
- Encourage others to contact their legislative members
- Keep up-to-date with PERSpective, the OPERS blog; Facebook and Twitter sites and [www.opers.org](http://www.opers.org)
- Read your newsletters

# Call to Action: OPERS Needs Your Support!



## *The Impact of Delayed Action*

**Continued delays not only affect health care but have caused OPERS to forfeit more than \$700 million in potential savings- that's nearly \$1 million per day**



# Ohio PERS



277 E. Town Street  
Columbus, OH 43215

1-800-222-7377

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

Available Media:   



**Thank you for supporting OPERS!**



**Questions?**



**Questions?**

# Ohio Deferred Compensation

**Jim Heagen-Assistant Director  
Administration**



OHIO DEFERRED  
COMPENSATION

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Overview of ORC 148.04

Amended by 128<sup>th</sup> General Assembly-effective 10/16/09

**(C) (1) Whenever an individual becomes employed in a position paid by a warrant of the director of budget and management, the employer shall do both of the following at the time the employee completes the employee's initial employment paperwork:**



OHIO DEFERRED  
COMPENSATION

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Overview of ORC 148.04

- (a) Provide to the employee materials provided by the OPEDCP under division (B) of this section regarding the benefits of long-term savings through deferred compensation;**
- (b) Secure, in writing or by electronic means, the employee's desire to participate or not participate in a deferred compensation program offered by the Board.**



# Overview of ORC 148.04

**An election regarding participation under this section shall be made in such manner and form as is prescribed by the OPEDCP and shall be filed with the program.**

- Supplemental Retirement Account Election Form



**OHIO DEFERRED  
COMPENSATION**

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# 148.04 continued

**The employer shall forward each acknowledgment form completed under this division to the deferred compensation program not later than forty-five days after the date on which the employee's employment begins.**



**OHIO DEFERRED  
COMPENSATION**

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Compliance with 148.04

**Through October 2011 the compliance rate was approximately 60%. The compliance percentage has been trending downward since that time.**



**OHIO DEFERRED  
COMPENSATION**

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Promotion of the Requirements of 148.04

**DAS and Ohio DC have developed a marketing plan to educate and remind HR administrators of the requirements of 148.04**

- **Email reminder from Director Blair to state agency heads**
- **Quarterly reminder for HR directors posted on HCM website.**
- **Presentation to HR directors**

# Promotion continued

➤ **Quarterly Web Banners on the [www.myOhio.gov](http://www.myOhio.gov) website:**

**1<sup>st</sup> Quarter: Tax advantages of Ohio DC**

**2<sup>nd</sup> Quarter: EZ Enrollment**

**3<sup>rd</sup> Quarter: SMarT Automatic Deferral Increase Plan**

**4<sup>th</sup> Quarter: Leave and Vacation Time Cash Out Opportunities**



**OHIO DEFERRED  
COMPENSATION**

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Resources Available to Comply with 148.04

Ohio DC employer website [www.OhioDC.org](http://www.OhioDC.org)

- Resource Center: It's Easy to Present the Benefits of Ohio DC to Employees

State of Ohio website [www.myOhio.gov](http://www.myOhio.gov)

- 6 Reasons to Enroll HR Power Point or PDF.
- HR Administrator "Talking Points" on the Features and Benefits of Ohio DC.
- Quarterly Web Banner displayed on website



OHIO DEFERRED  
COMPENSATION

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Additional Information

- If you would like paper copies of the Supplemental Retirement Account Election Form or any Ohio DC materials please contact: Cedric Gaaskjolen at (614) 222-9421 or [gaaskjc@nationwide.com](mailto:gaaskjc@nationwide.com)
- Information relating to employee questions about Ohio DC can be found on our participant website at [www.Ohio457.org](http://www.Ohio457.org)



OHIO DEFERRED  
COMPENSATION

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM

# Questions?



OHIO DEFERRED  
COMPENSATION

OHIO PUBLIC EMPLOYEES DEFERRED COMPENSATION PROGRAM



# Question & Answer Session

Email Questions: [dashrd.hrevents@das.state.oh.us](mailto:dashrd.hrevents@das.state.oh.us)