

Running Head: HUMAN RESOURCES TOOLKIT

Human Resources Toolkit

Presented by Sarah Lander and Anne Hepburn

Management of Information Agencies
Donna Reed, Instructor

Emporia State University

Human Relations Toolkit

Human Relations is a complex organization within an organization. Because libraries cannot operate without a staff, the Human Relations department is a vital component to any library's success. For this toolkit, we have compiled resources that will fit three categories: The "Reference Shelf", which is comprised of books and materials that a Human Relations person may find helpful to have on hand for reference; "Professional Organizations", which are either dedicated to Human Resources and Management, or are professional organizations that offer guidelines or advocacy for how Human Resources operate at the individual library level; and a "Staying Current" category, which is comprised of blogs and websites that are disseminating the most up to date changes and issues of Human Resources Management.

REFERENCE SHELF

Carter-Scott, C. (2000). *Negaholics no more*. Shawnee Mission, KS: National Press Publications.

Negaholics no more, provide tools and strategies to change the negative thinking of others and yourself. The book outlines 12 types of negaholics and gives a 7-step program to make the change to positivity.

Daly, P. H., Watkins, M., & Reavis, C. (2006). *The first 90 days in government: Critical success strategies for new public managers at all levels*. Boston, Mass: Harvard Business School Press.

The first 90 days in government: Critical success strategies for new public managers at all levels, concisely addresses the differences between public and private sectors to accelerate the transition to the public sector by clarifying how success and failure are rewarded or penalized, measured and defined. Giving suggestions for team building, stress management and goal setting.

Fisher, R., Ury, W., & Patton, B. (1991). *Getting to yes: Negotiating agreement without giving in*. New York, N.Y.: Penguin Books.

Getting to yes: Negotiating agreement without giving in, decides four principles for effective negotiation 1) separate the people from the problem; 2) focus on interests rather than positions; 3) generate a variety of options before settling on an agreement; and 4) insist that the agreement be based on objective criteria. Additionally the authors discuss how to overcome obstacles in negotiations.

Fitzwater, T. L. (2000). *Behavior-based interviewing: Selecting the right person for the job*. Menlo Park, CA: Crisp Publications.

Part of the 50-minute series of books, this book is designed to be read front to back while working through worksheets. This book provides samples of interview techniques and sample interview evaluation tools.

Fournies, F. F. (1978). *Coaching for improved work performance*. New York: Van Nostrand Reinhold.

Coaching for improved work performance, challenges the belief of managers about their subordinate, themselves and management it's self. Based on a theory the book discusses techniques to solve employee nonperformance.

Fournies, F. F. (1981). *Face to face Coaching for improved work performance*. Hollywood, CA: Cally Curtis.

Video based in part on the book, *Coaching for improved work performance*.

Gravett, L., & Throckmorton, R. (2007). *Bridging the generation gap: How to get radio babies, boomers, Gen Xers, and Gen Yers to work together and achieve more*. Franklin Lakes, NJ: Career Press.

Bridging the generation gap: How to get radio babies, boomers, Gen Xers, and Gen Yers to work together and achieve more, attempts to give you practical tips for over coming the multigenerational dilemmas that exist in the business world. The authors name 5 generations in the workforce that all have different upbringings and perspectives causing differences that need to be understood for effective management and conflict minimization.

McArdle, G. E. H. (1995). *Managing differences: A guide to proactive management skills*. Menlo Park, CA: Crisp Publications.

Managing differences, is written by an experience HR manger in both the public and private sectors. This book uses self questionnaires to improve your understand and ability to manage differences.

Patton, W. D. (2002). *Human resource management: The public service perspective*. Boston: Houghton Mifflin.

Human resource management: The public service perspective, an upper-level text examines the techniques and practices used by managers, and provides an overview of basic concepts. Utilizing case studies, exercises and readings about public HR management.

Walton, R. E., & McKersie, R. B. (1965). *A behavioral theory of labor negotiations; An analysis of a social interaction system*. New York: McGraw-Hill.

A behavioral theory of labor negotiations; An analysis of a social interaction system, should be used as a theoretical preparation for union and other labor contract negotiations. A dry read, but valuable baseline establisher.

PROFESSIONAL ORGANIZATIONS

- [American Library Association](#) (ALA)
- [Association of College and Research Libraries](#) (ACRL) –a division of ALA specific to academic libraries.

- [International Public Management Association for Human Resources](#) (IPMA - HR)
- [Labor and Employment Relations Association](#) (LERA)
- [National Public Employer Labor Relations Association](#) (NPELRA)
- [Public Library Association](#) (PLA) –a division of ALA specific to Public Libraries.
- [Society for Human Resource Management](#) (SHRM) (Private sector)

KEEPING CURRENT

- ACRL [Sample Job Descriptions](#)
- ALA [Sample Job Descriptions](#)
- [About.com](#) : Human Resources

This site has a variety of resources for HR managers including management techniques, sample job interview questions, resumes, policies, and much more.

- Bureau of Labor and Industries (BOLI) <http://www.boli.state.or.us/>
- Department of Labor <http://www.dol.gov/>
- HR Answers <http://www.hranswers.com/> (newsletter and other)
- [Public Employee Collective Bargaining Act](#) (PECBA)
- Performance Review [Timeline and Guidelines](#), from the University of Maryland
- [Management Help](#) website has many different resources regarding many areas of Human Resources management, including this [resource page](#) full of Employee Performance Review information.
- [New Mexico State Library](#) section on Job Descriptions:

SAMPLES (Provided by the City of Milwaukie)

- Employee Performance Appraisal
- Self Evaluation Form
- HR purpose statement
- Injury procedures
- External Application Process Policy
- Job Analysis Questionnaire
- Recruitment and Selection Policy
- New Employee Orientation Policy

- New Employee Checklist
- Librarian Job Discription

• EMPLOYEE PERFORMANCE APPRAISAL

Name: [REDACTED]	Position: [REDACTED]
Department: [REDACTED]	Supervisor (Reviewer): [REDACTED]
Type of Review: Probationary <input type="checkbox"/> Annual <input type="checkbox"/> Quarterly update <input checked="" type="checkbox"/> Other <input type="checkbox"/> [REDACTED]	
Date of Review [REDACTED] / [REDACTED] / [REDACTED]	
Attach a current job description for the position to the evaluation prior to discussing the evaluation with the employee.	

The Performance Planning process is an ongoing dialogue between the supervisor and the employee. The purpose of the performance is for the employee and the supervisor to come to a shared understanding of the standards of performance expected of the employee and how well the employee is doing in meeting those standards. This process begins at the start of the appraisal period with setting the goals and desired outcomes for performance for the upcoming evaluation period. It includes the ongoing monitoring and feedback on performance throughout the appraisal period. The final phase is the formal evaluation that occurs at the end of the appraisal period.

This **Employee Performance Plan** is a tool to facilitate the dialogue between the supervisor and the employee by providing the topics that should be covered in the discussion. At least annually the supervisor and the employee should complete the Employee Performance Plan. This includes noting comments and ratings for the Performance Measurement Criteria in Section I, noting if objectives from the previous appraisal period were met in Section II and setting goals and desired outcomes for the employee's performance for the upcoming year in Section III. This should include a discussion of these areas in addition to documenting specifics about performance on this form. If at any time during the evaluation period either the supervisor or employee is aware of a situation outside of the employee's control that would prevent the employee from meeting a goal, either party should initiate a discussion to amend that goal.

Prior to completing this form, gather input from the employee on the self-evaluation form.

Job Analysis Questionnaire

SECTION I: PERFORMANCE MEASUREMENT CRITERIA

The supervisor, with input from the employee, provides narrative comments regarding the employee's performance during the rating period. "Developing" is used for employees new to the position who are in a learning phase. "Needs Improvement" is used for employees who have adequate time to learn the position and are still not meeting performance expectations in the area being rated.

CRITERIA	COMMENTS (Attach additional pages if necessary)
<p style="text-align: center;">Public Service</p> <p>Awareness, foresight, commitment to service of the public. Employee recognizes and respects the value of public service and presents a positive image of the City. This commitment is demonstrated by the quality of service. Listens openly by asking questions to clarify customer concerns. Takes initiative to resolve problems and accomplish duties. Can be relied upon to follow through on assignments and meet deadlines.</p>	Exceeds <input type="checkbox"/> Fully Effective <input type="checkbox"/> Developing <input type="checkbox"/> Needs Improvement <input type="checkbox"/>
<p style="text-align: center;">Teamwork/Internal Service</p> <p>Builds collaborative trust with team members. Openly communicates with others regarding work. Treats co-workers with respect. If there is a concern with a co-worker or community partner, addresses that concern directly with the person or supervisor. Is punctual in attendance. Efficient in managing City resources. Is accountable for actions.</p>	Exceeds <input type="checkbox"/> Fully Effective <input type="checkbox"/> Developing <input type="checkbox"/> Needs Improvement <input type="checkbox"/>
<p style="text-align: center;">Judgment</p> <p>Thinks logically and utilizes independent thought to make sound decisions on routine and complex problems. Knows when to make decision and when to refer an issue to supervisor. Ability to handle confidential information.</p>	Exceeds <input type="checkbox"/> Fully Effective <input type="checkbox"/> Developing <input type="checkbox"/> Needs Improvement <input type="checkbox"/>
<p style="text-align: center;">Safety</p> <p>Performs tasks in accordance with established safety procedures and by keeping up-to-date with changes in safety policies and procedures. Reports unsafe working conditions immediately to a supervisor. Takes immediate corrective action where appropriate.</p>	Exceeds <input type="checkbox"/> Fully Effective <input type="checkbox"/> Developing <input type="checkbox"/> Needs Improvement <input type="checkbox"/>
<p style="text-align: center;">Job Knowledge</p> <p>Strives to learn all aspects of position. Has thorough understanding of duties and demonstrates that knowledge in the performance of job duties and service of the customers. Keeps updated on new information regarding position. Constructively applies knowledge gained from prior work experience. Follows standards of practice in respective field.</p>	Exceeds <input type="checkbox"/> Fully Effective <input type="checkbox"/> Developing <input type="checkbox"/> Needs Improvement <input type="checkbox"/>
<p style="text-align: center;">Management Responsibilities (for supervisors only)</p> <p>Provides effective leadership. Trains and evaluates staff, Sets clear expectations; completes evaluations on time; and provides appropriate feedback to staff. Takes corrective action when necessary in a manner that is in accordance with City policy. Plans and coordinates activities of department in efficient and effective manner. Properly prepares and monitors budget.</p>	

Exceeds Fully Effective Developing Needs Improvement

SECTION II: PERFORMANCE ON PREVIOUSLY ESTABLISHED GOALS

The supervisor, with input from the employee, provides narrative comments regarding the employee's performance on the Goals & Outcomes previously established for the rating period currently being evaluated. Provide a brief description of previously established goals and give narrative examples of work performance illustrating rating.

Goal:
Give examples of employee's performance as related to the goal:
Rating: Exceeds Goal <input type="checkbox"/> Meets Goal <input type="checkbox"/> Does Not Meet Goal <input type="checkbox"/> Goal Adjusted – No Fault of Employee <input type="checkbox"/>

Goal:
Give examples of employee's performance as related to the goal:
Rating: Exceeds Goal <input type="checkbox"/> Meets Goal <input type="checkbox"/> Does Not Meet Goal <input type="checkbox"/> Goal Adjusted – No Fault of Employee <input type="checkbox"/>

Goal:
Give examples of employee's performance as related to the goal:
Rating: Exceeds Goal <input type="checkbox"/> Meets Goal <input type="checkbox"/> Does Not Meet Goal <input type="checkbox"/> Goal Adjusted – No Fault of Employee <input type="checkbox"/>

Goal:
Give examples of employee's performance as related to the goal:
Rating: Exceeds Goal <input type="checkbox"/> Meets Goal <input type="checkbox"/> Does Not Meet Goal <input type="checkbox"/> Goal Adjusted – No Fault of Employee <input type="checkbox"/>

Goal:
Give examples of employee's performance as related to the goal:
Rating: Exceeds Goal <input type="checkbox"/> Meets Goal <input type="checkbox"/> Does Not Meet Goal <input type="checkbox"/> Goal Adjusted – No Fault of Employee <input type="checkbox"/>

SECTION III: ESTABLISHMENT OF GOALS & MEASUREMENTS FOR UPCOMING RATING PERIOD

Outline the **Goal** for the upcoming period and the desired outcome. The **Goal** may include a new project or may include a goal that is an ongoing essential function of the employee's position. Any number of goals may be set. Generally use the least number that it takes to adequately measure an employee's success in the position. The **Measurement of Goal** is the standard against which the employee's performance will be measured. These should be specific and measurable including timeframes. **Resources needed** should include any additional resources (if any) that the supervisor and employee determine will need to be provided to the employee to be successful in accomplishing the individual goal. These may include training, additional assistance from other employees, equipment, budget etc.

Goal:	This goal is: ONGOING <input type="checkbox"/> PROJECT ORIENTED <input type="checkbox"/>
Measurement of Goal:	
Additional Resources Needed:	

Goal:	This goal is: ONGOING <input type="checkbox"/> PROJECT ORIENTED <input type="checkbox"/>
Measurement of Goal:	
Additional Resources Needed:	

Goal:	This goal is: ONGOING <input type="checkbox"/> PROJECT ORIENTED <input type="checkbox"/>
Measurement of Goal:	
Additional Resources Needed:	

Goal:	This goal is: ONGOING <input type="checkbox"/> PROJECT ORIENTED <input type="checkbox"/>
Measurement of Goal:	
Additional Resources Needed:	

Goal:	This goal is: ONGOING <input type="checkbox"/> PROJECT ORIENTED <input type="checkbox"/>
Measurement of Goal:	

SECTION VIII: OVERALL PERFORMANCE MANAGEMENT RATING

The following is an overall performance rating for the employee, recommended action by the supervisor, and sign-off by all. The employee's signature does not necessarily mean that the employee agrees with the rating, only that the evaluation process has taken place.

Overall Rating (check one):

Exceeds: Exceeds expectations in all or majority of categories.

Fully Effective: Meets expectations in all categories (may exceed in some)

Developing: does not meet expectations in one or more category

Needs Improvement: Does not meet expectations in majority of categories

Recommended Action by Supervisor:

I recommend a merit/step increase. Yes No N/A

I recommend the employee moves from probation to Regular status. Yes No N/A

Employee Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____

Department Director's Initials: _____ Date: _____

HR Reviewer's Initials: _____ Date: _____

Self Evaluation Form

CITY OF MILWAUKIE

Name: _____

Date: _____

Instructions:

Supervisor:

- Fill in the date you want this form returned in the employee instructions section.
- Give this form and a copy of the previous appraisal form to the employee prior to completing the current performance appraisal form.

Employee:

- This form is to be completed prior to the formal performance evaluation. The response to this will be considered by the supervisor when completing the evaluation.
- Please return this form to your supervisor by _____.
- Please respond to the following:

Fill in the goals for this past appraisal period and note what progress you made toward accomplishing those goals.

Goal:

Give examples of your performance as related to the goal:

Goal:

Give examples of your performance as related to the goal:

Goal:

Give examples of your performance as related to the goal:

Goal:

Give examples of your performance as related to the goal:

Goal:

Give examples of your performance as related to the goal:

Is there anything else you consider a significant accomplishment this past year?

What would you like to see as goals for the upcoming appraisal period?

Goal:
Goal:
Goal:
Goal:
Goal:
Goal:
Goal:

What are your goals for professional development and is there any training you need to accomplish this? This may include on the job training or off site training.

Is there anything that the organization or I as your supervisor can do differently that would assist you in being more effective in the performance of your job?

Any other comments?

HR PUROSE STATEMENT

The Human Resources department promotes the equitable and consistent interpretation and application of personnel policies, procedures, and systems throughout the City and ensures the City is legally compliant in respect to personnel issues. Human Resources provides services and support for the management of personnel in all areas of City operations by serving as an internal consultant to the City for all human resource functions including:

- ◆ Employee recruitment and selection;
- ◆ Management of employee and labor relations;
- ◆ Legal compliance of the City in respect to personnel issues;
- ◆ Maintenance and management of the employee personnel records;
- ◆ Management of the performance evaluation process;
- ◆ Benefits administration;
- ◆ Interpretation of personnel policies;
- ◆ Guidance to department heads and supervisors relating to the management of employee performance and discipline procedures;
- ◆ Management of the employee classification and compensation systems;
- ◆ Assistance with organizational development and training; and
- ◆ Workers' compensation claim processing

Two department consists of an HR Director and HR Assistant. They work together to provide the full range of Human Resource services to the City that are listed above.

INJURY PROCEDURES

What to do if you are INJURED at work

- 1) Notify your supervisor, or acting supervisor, **immediately**.
- 2) Get medical help if you need it
 - a. If your injury is life-threatening, call or have someone call 911.
 - b. If your injury is serious but not life-threatening go to the **nearest urgent care clinic** or **emergency room**. You may have someone take you or be transported by ambulance as is appropriate. If the situation is serious enough to go to an emergency room, you should not be driving yourself. You may choose which provider you go to. Here are a couple that are close:
 - **Providence Hospital-Milwaukie**: 10150 SE 32nd Ave, Milwaukie 97222. Phone # 503-513-8300
 - **Kaiser-Sunnyside**: 10180 SE Sunnyside Rd, Clackamas 97015. Phone # 503-652-2880
 - **Willamette Falls-Urgent Care**: 9775 SE Sunnyside Rd, Clackamas 97015. Phone # 503-654-8417
 - c. If your injury is not serious, you **may go to your doctor** or you may contact HR for a list of providers.
- 3) Fill out the necessary paperwork.
 - a. **Always** fill out a **Supervisor's Accident Investigation form** with your supervisor. Forward it to the **HR office immediately**.
 - b. If you received more than first aid (i.e., doctor's visit) then you must also fill out an **801 form** and forward it to the **HR office immediately**.
 - c. If you have any questions, **contact your supervisor or HR**.
- 4) If you are not sure what to do, call HR!

A couple of things to remember:

- 1) You do not have to go to any specific provider, you may choose which doctor you see
- 2) You **MUST** fill out the paperwork and send it to HR within 48 hours. Turning in the paperwork on time is very important in processing your workers' compensation claim. Both forms are available on the intranet and in each building.

EXTERNAL APPLICATION PROCESS

Job Listings and Applications

- ◆ Check for current job openings on the Current Job Opportunities page.
- ◆ Application forms, which are available in either Microsoft Word or Adobe Acrobat PDF formats, will be listed for each open recruitment. The application and any supplemental materials must be completed and returned by the listed deadline to be considered for the position.
- ◆ Required supplemental materials will be listed separately if the recruitment requires information other than an application form.
- ◆ **Applications are available at the** City of Milwaukie Human Resources Department, 10722 SE Main Street, Milwaukie, OR 97222, by calling (503) 786-7507, or by e-mailing hr@ci.milwaukie.or.us.

Application Deadlines

- ◆ Completed applications must be turned into Human Resources Department **by 4 p.m. on the closing date unless otherwise stated on the announcement.** Applications submitted after the listed deadline will not be considered.
- ◆ We will accept faxed, electronic, or hard copy versions of application packets. **If you are submitting the application via e-mail, it may be signed at time of interview, should you be selected.**
- ◆ Information regarding the status of your application will be mailed to you generally 2-3 weeks after the closing date.

General Information

- ◆ The City only accepts applications for position vacancies that have been announced and have been posted.
- ◆ We do not accept résumés in lieu of an application packet, but it may be included in your materials.
- ◆ The City of Milwaukie is committed to providing an equal opportunity for all individuals who are seeking employment. The objective of the City of Milwaukie's hiring procedure is to select based on merit, efficiency, and responsiveness to ensure the best-qualified applicants will be selected. We encourage you to provide us with complete and accurate information that demonstrates your qualifications to perform the duties of the job for which you are applying.
- ◆ Any applicant with a disability who needs reasonable accommodation in any step of the hiring process may request assistance that will provide the applicant with the opportunity to demonstrate his or her qualifications to perform the duties of the job for which the applicant is applying. An applicant who needs reasonable accommodation that will assist in any step of the hiring process should inform the Human Resources Director, City Hall, 10722 SE Main St. Milwaukie OR 97222; 503-786-7506; or via e-mail at rowem@ci.milwaukie.or.us.
- ◆ You must complete all of the inquiries on the application accurately and truthfully. As part of the application process, the City will verify information on your

application form. Reporting false, inaccurate, or misleading information is grounds for rejecting your application or terminating your employment if the information is discovered after the date of hire.

I-9 Documentation Required

- ◆ Employment of persons hired by the City will be contingent upon presentation of acceptable documents to verify identity and authorization for employment in the United States as required by the Immigration Reform and Control Act of 1986.

Pre-Employment Screenings

- ◆ The City of Milwaukie requires successfully passing pre-employment screenings including: drug screenings, physical capacity tests, physical agility tests, and/or a background check. The type of screening required will depend on the position.

Last updated: 09/17/08

Name:	Job Title:
Department:	Union:

GENERAL PURPOSE. Briefly describe the job's primary purpose or contribution to the department or organization.

ESSENTIAL DUTIES AND RESPONSIBILITIES. List the job's essential or most important functions and responsibilities. Include all important aspects of the job -- whether performed daily, weekly, monthly, or annually; and any that occur at irregular intervals.

Essential Functions/Major Duties	Hours/Wk
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	

(Continue on back side of sheet if necessary)

PERIPHERAL DUTIES AND RESPONSIBILITIES. List the job's duties which are not essential functions, but are "peripheral" or "secondary" to the job. These are generally duties that are also performed by people in other positions and thus may not be an essential duty of this position. Examples may include serving on an employee committee, backing-up or filling-in for other positions.

1. _____
2. _____
3. _____
4. _____
5. _____

(Continue on back side of page 1 if necessary)

JOB SPECIFICATIONS:

(Job preparation and prior work experience requirements a minimum standards. Other equivalent combinations of education, truing, and experience will be considered.)
Disregard your own qualifications and consider only the job's requirements.

Formal Education And Training:

1. Which formal education level is required to perform you job? (DO NOT indicate your education level, rather the minimum level required to perform the job.)

- () No formal education required.
- () High school education or equivalent.
- () Apprenticeship or Certificate: number of years: ____ and specialty: _____.
- () Some higher education or vocational training specializing in _____.
- () Associate degree or equivalent specializing in _____.
- () Bachelor's degree or equivalent specializing in _____.
- () Master's degree or equivalent specializing in _____.

2. What kind/type of training is required to perform your job? Indicate the amount of time and whether the training is attained on the job or in a classroom setting.

3. Does your job require certain licenses, certificates, and registration? Explain.

4. Specific skills required: Describe what specific skills and proficiency are required to do the job (e.g., reading, writing, oral communication skills, good statistical analysis ability, typing speed, computer use, 10-key, manual dexterity, etc.).

5. Describe the physical and mental requirements necessary to perform the job (e.g., ability to conduct interpersonal interactions, make complex decisions, use telephone, keyboard, stand for long periods of time, lift, move throughout the department and City, etc.).

Prior Work Experience:

Indicate the minimum type and quantity of prior work experience required in addition to the training specified in the above JOB PREPARATION section to perform the functions of your job. Again, disregard your own qualifications and consider only the job's requirements.

1. Identify type of experience required: (e.g. work which employs the technical skills of your job, work which involves supervision of others, total years of prior experience.)

- No specific experience required.
- 1 - 6 months _____
- 6 - 12 months _____
- 1 - 2 years _____
- 3 - 4 years _____
- 5 - 6 years _____
- 7 or more years _____

2. Describe the extent of knowledge about other City functions that are required to perform your job, include amount of experience needed, if applicable.

Necessary Knowledge, Skills And Abilities:

1. Describe the type and level of knowledge (e.g., some, working, considerable,. some knowledge of general office procedures, considerable knowledge of strategic planning and budgeting policies and procedures.)

2. List job skills related to specific job functions such as typing (include speed), dictation, 10-key, specific manual dexterity skills, etc.

3. Indicate which of the following mental activities are required by the work. Use the following code to indicate how often you use, or how much of your work involves the use of each mental activity: **N** = Never (0%), **R** = Rarely (0-20%), **O** = Occasionally (21-50%), **F** = Frequently (51-80%), and **C** - Continuously (81+%).

- | | |
|---|---|
| <input type="checkbox"/> Decision Making | <input type="checkbox"/> Use of Discretion |
| <input type="checkbox"/> Interpersonal Skills | <input type="checkbox"/> Presentations/Teaching |
| <input type="checkbox"/> Teamwork | <input type="checkbox"/> Problem Analysis |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Negotiation |
| <input type="checkbox"/> Mentoring | <input type="checkbox"/> Training/Supervising |
| <input type="checkbox"/> Read English | <input type="checkbox"/> Write English |
| <input type="checkbox"/> Speak English | <input type="checkbox"/> Understand English |
| <input type="checkbox"/> Perform basic Math (add, subtract, multiply and divide). | |
| <input type="checkbox"/> Perform advanced Math (analysis, statistics, significant data or number manipulation) | |
| <input type="checkbox"/> Perform basic programming (database set up, setting system defaults, some software modifications). | |
| <input type="checkbox"/> Perform advanced programming (software development and /or modification, and system development). | |
| <input type="checkbox"/> Independent Judgment and/or Independent Action | |

4. Describe any other mental activities required.

5. Describe the tools and equipment used: (e.g. personal computer system, including word-processing and spreadsheets, phone, dump trucks, etc.)

SUPERVISION RECEIVED: Please list the title of your immediate supervisor.

SUPERVISORY DUTIES AND RESPONSIBILITIES:

Describe any supervisory responsibilities that you have. Check applicable category.

- 1. Job is not supervisory in nature.
- 2. Job is supervisory to the extent that daily work direction and job skill training is provided to personnel in subordinate classifications.
- 3. Job is supervisory to the extent that approves absences or overtime.
- 4. Job in addition to responsibility in #2. above, involves having authority that is not of a merely routine or clerical nature but requires use of independent judgment: Note those supervised Directly (D) and InDirectly (ID). Also, note whether Recommend Only (RO) or: Effectively Recommend (ER) or: Final Authority (FA).

Type of Supervision	Level of Supervision (e.g. D, FA)	Department/Division Position Titles	Number of Employees
hiring			
transferring			
suspending			
lay off			
recall			
promotion			
discharge			
assignment			
reward			
discipline			
adjust grievances			
other:			

COMMUNICATIONS:

1. What portion of your job involves communication with others?

- Less than 20 %
 20 - 40%
 40 - 60%
 60 - 80%
-

2. Of the contacts you have, what percentage are:

_____ % on the phone _____ % face to face.

3. Complete the following chart to illustrate the complexity, the frequency, and the confidentiality or sensitivity of information.

- | | |
|--------------------|--|
| <u>Code</u> | <u>Complexity</u> |
| 1. | Routine, non complex |
| 2. | Generally routine, some degree of complexity |
| 3. | Moderately complex |
| 4. | Frequently complex |
| 5. | Highly complex |

- | | | | |
|--------------------|-------------------------|--------------------|-------------------------------|
| <u>Code</u> | <u>Frequency</u> | <u>Code</u> | <u>Confidentiality</u> |
| AN | Almost never | AN | Almost never |
| O | Occasionally | O | Occasionally |
| R | Regularly | R | Regularly |
| | | F | Frequently |
| | | E | Extensively |

With Whom (% of contacts)	Frequency	Complexity	Confidentiality
City residents ()			
Other depts. Within the City ()			
Vendors ()			
Other government entities ()			
Professional service firms () (attorneys, accountants, engineers, etc.)			
Media ()			
General Public ()			
Subordinates () -NA			
Other: <u>Team-members</u> ()			

COGNITIVE FUNCTIONS:

1. Describe the degree to which your job is performed independently, without direct supervision.

- Closely supervised.
- Some independence, but work is reviewed regularly.
- Moderate level of independence.
- Work is only occasionally monitored, minimal supervision.
- Work is performed highly independently, little direction given.

2. To what extent are policies and procedures developed which govern the performance of your job?

- Operate from specific and definite directions and instructions, extremely well defined, extensively develop.
- Operate from established and well known procedures but with some latitude.
- A moderate level of structure exists.
- Some policies/procedure exist, determine own practices and procedures by contributing to the development of new concepts.
- Virtually nonexistent, responsible for developing policies and objectives.

3. Describe the problems which must be solved in the course of work:

- Routine, repetitive in nature, extensive precedent.
- Of some difficulty, but generally routine.
- Of moderate difficulty, precedent often available.
- Quite difficult, precedent occasionally available.
- Highly difficult and complex, almost no precedent.

4. Describe the level of complexity related to your essential functions/major responsibilities:

- Job involves a low level of complexity.
- Job involves a moderate degree of complexity.
- Job involves a high degree of complexity.

5. What about your job makes it complex?

6. To what extent does your job require creativity or innovation:

- Almost never
- Occasionally
- Regularly
- Frequently
- Extensively

Impact Of Errors:

7. Is your work normally verified or checked by another?

- Yes No

If yes, by what function? (Supervisor, Lead, next job in work flow, etc.)

8. Describe how an error in your work might affect work flow, other jobs, and/or City operations in general:

Budget projections and expenditure planning is affected by accounting errors.

PHYSICAL CONDITIONS:

Job Conditions:

1. Indicate the degree to which the following conditions are present in your job using the following code:

N = Negligible S = Slight M = Moderate E = Extreme

Activity	Degree	Activity	Degree
Hazards		Physical Effort	
Temperature Extremes		Constant Standing	
Travel		Evening meetings	
On-call status		Overtime	
Close work		inflexible work station/extended data entry	
Dirty or otherwise disagreeable conditions		Other: (describe)	

2. Briefly describe the conditions for which you responded other than "N".

3. What are normal working hours for your job?

Physical Demands:

1. How much on-the-job time is spent in the following physical activities? Show the amount of time by inserting the number representing the appropriate response below.

Physical Activity and amount of time spent doing it:

- | | |
|--------------------|--------------------------|
| <u>Code</u> | <u>Time Spent</u> |
| 1. | None |
| 2. | Less than 1/3 of my time |
| 3. | 1/3 to 2/3 of my time |
| 4. | More than 2/3 of my time |

- | | | | |
|--|---|---|-------------------------------|
| <input type="checkbox"/> Stand | <input type="checkbox"/> Walk | <input type="checkbox"/> Sit | <input type="checkbox"/> Talk |
| <input type="checkbox"/> Hear | <input type="checkbox"/> Bend | <input type="checkbox"/> Use hands to finger, handle, or feel | |
| <input type="checkbox"/> Climb or balance | <input type="checkbox"/> Stoop, kneel, crouch, or crawl | | |
| <input type="checkbox"/> Reach with hands and arms | <input type="checkbox"/> Taste or smell | | |

2. Does this job require that weight be lifted or force be exerted? If so, how much and how often? Enter the number representing the appropriate response in the chart below.

- | | | | |
|--------------------|--------------------------|--------------------|-----------------------|
| <u>Code</u> | <u>Time:</u> | <u>Code</u> | <u>Weight:</u> |
| 1. | None | A. | None |
| 2. | Less than 1/3 of my time | B. | Up to 10 pounds |
| 3. | 1/3 to 2/3 of my time | C. | 11 to 25 pounds |
| 4. | More than 2/3 of my time | D. | 26 to 50 pounds |
| | | E. | 51 to 100 pounds |
| | | F. | More than 100 pounds |

Activity	Time	Weight
Pushing		
Pulling		
Lifting		
Carrying		

3. Describe any other physical activities required:

4. Tools And Equipment: Please list the tools and equipment you commonly use to perform the essential duties of your job (e.g. dump truck, phone, hand tools, personal computers, etc.):

5. Does this job have any special vision requirements? Check all that apply.

- Close Vision (clear vision at 20 inches or less)
- Distance Vision (clear vision at 20 feet or more)
- Color Vision (ability to identify and distinguish colors)
- Peripheral Vision (ability to observe an area that can be seen up and down or to the left and right while eyes are fixed on a given point)
- Depth Perception (three-dimensional vision, ability to judge distance and spatial relationships)
- Ability to Adjust Focus (ability to adjust the eye to bring an object into sharp focus)
- No Special Vision Requirements

6. List any other physical demands not listed above that your job requires.

7. List any comments you would like to make on the essential job duties that require the physical demands selected above.

Work Environment:

1. How much exposure to the following environmental conditions does this job require?
Enter the number representing the appropriate response below.

<u>Code</u>	<u>Environmental Condition</u>
1.	No exposure to this environmental condition
2.	Less than 1/3 of my time
3.	1/3 to 2/3 of my time
4.	More than 2/3 of my time
<input type="checkbox"/>	Wet, humid conditions (non-weather)
<input type="checkbox"/>	Work in high, precarious places
<input type="checkbox"/>	Toxic or caustic chemicals
<input type="checkbox"/>	Extreme cold (non-weather)
<input type="checkbox"/>	Risk of electrical shock
<input type="checkbox"/>	Risk of radiation
<input type="checkbox"/>	Work near moving mechanical parts _____
<input type="checkbox"/>	Fumes or airborne particles
<input type="checkbox"/>	Outdoor weather conditions
<input type="checkbox"/>	Extreme heat (non-weather)
<input type="checkbox"/>	Work with explosives
<input type="checkbox"/>	Vibration

2. How much noise is typical for the work environment of this job? Check the appropriate level below.

- Very Quiet (e.g. forest trail, isolation booth)
- Quiet (e.g. library, private office)
- Moderate Noise (e.g. standard business office with equipment)
- Loud Noise (e.g. heavy traffic, contractor's equipment)
- Very Loud Noise (e.g. jack hammer work, rock concert)

3. List any other environmental conditions not listed above that you are exposed to while performing required job duties.

4. List any comments you have on the specific job duties that are affected by the environmental conditions selected above.

RESOURCE ACCOUNTABILITY:

1. Indicate the approximate dollar value of the following resources which are the responsibility of your job. Also, indicate the degree of impact or influence which you have on each resource, remembering for purchasing your signature authority.

S = Slight **M** = Moderate **E** = Extensive

Resource	Value (\$)	Impact
Annual operating budget		
Annual capital budget		
Plant and equipment		
Investments		
Revenue		
Annual cash transactions		
Supplies and materials inventory		

2. Describe the scope of any budgetary accountability encountered in your job.

- Not accountable for budget preparation or compliance.
- Make budgetary recommendations.
- Partial budgetary preparation/compliance accountability.
- Total budgetary preparation/compliance accountability.
- Other (describe):

3. Describe the scope of capital asset control accountability in your job.

- Not accountable for control of capital assets.
- Partially accountable for control of capital assets.
- Totally accountable for control of capital assets.

4. Which of the following nonmonetary resources does your job have responsibility for and what is your degree of impact on the resource?

S = Slight M = Moderate E = Extensive

Resource	Impact
Data bases (list):	
Contracts (list):	
Other (list):	

Scope Of Long-Range Planning Involvement:

1. Describe the scope of long-range planning involvement encountered in your job.

Operational (Internal)

- Not involved in long-range operational planning.
- Informally makes recommendations concerning long-range operational planning
- Partially accountable for long-range operational planning.
- Totally accountable for long-range operational planning.

Strategic (External)

- Not involved in long-range operational planning.
- Informally makes recommendations concerning long-range operational planning
- Partially accountable for long-range operational planning.
- Totally accountable for long-range operational planning.

ADDITIONAL COMMENTS

Please list any additional comments that will provide a more accurate or complete description of your job:

**ATTACHMENT
SUPERVISOR'S COMMENTS**

Supervisors are requested to review the information provided by the job incumbent on the job analysis questionnaire. Supervisors should make any comments concerning accuracy, thoroughness, etc. in the space below. Identify whether this position is accurately described, over or understated. Explain difference between this description and the position's responsibilities as you see them.

Supervisors are requested to sign this form as a means of verifying their review of the information submitted by the job incumbent. Completed forms should be returned to:

**Mary Rowe
Human Resources
City Hall**

SUBJECT: Recruitment and Selection

Effective Date: January 15, 2008

Purpose

To establish a systematic and equitable manner by which employees are recruited and selected.

Definitions

At Will Appointment: Any employee appointed to “at will” employment. This includes the City Manager, Municipal Judge, and department heads. Such persons serve at the pleasure of the appropriate appointing authority as provided in the City Charter or Code or in their employment agreements. Provisions of the administrative procedures will cover these employees only where consistent with their employment agreement and the nature of at will employment.

Full Time Position: A work schedule of normally forty (40) hours during the week.

Limited Term Position: With mutual agreement between the City and Union, a person may be appointed to a position for a limited duration of up to two (2) years. The provisions of the contract cover limited term employees except that they do not have access to seniority or layoff provisions. Such positions might be used if the funding source is a grant.

Part Time Position: A position requiring an employee to work less than a full-time schedule on either a daily or weekly basis. Part-time employees may be appointed to authorized positions of less than 1.0 FTE. Part-time appointments of .5 FTE or greater, excluding temporary positions, are considered in regular status service and employees may accrue benefits on a prorated basis based on the budgeted FTE of the position.

Probationary Appointments: Appointments made at entrance, promotion, or reemployment to a position shall be considered probationary appointments. Probationary appointments may be made to either full-time or part-time positions. Probation is considered the final step in the selection process.

Regular Status Appointments: The status of employees who have successfully completed a probationary period for a budgeted full or part-time position other than seasonal or temporary.

Temporary Position: A position that is of limited duration of up to 9 months if .5FTE or greater. A temporary position may be longer in duration if less than .5 FTE. Synonymous with seasonal.

Trainee Appointments: An appointment to a position for which a training plan has been developed. The training plan should take no more than twelve (12) months to complete. At the successful completion of the training program the employee will then be promoted into a regular status classification. If the trainee does not successfully complete the training program by the end of twelve months, the employee maybe separated from City service. The employee will be entitled to the benefits of a probationary employee while in the trainee status.

Objective

The City is able to attract and retain a qualified workforce for positions.

Scope

All positions.

Policy

All recruitment and selection processes will be conducted in a manner consistent with the City of Milwaukie being an equal opportunity employer. The City of Milwaukie will not discriminate against any employee or applicant for employment because of political affiliation, race, national origin, age, sex, religious affiliation, marital status, mental or physical disability (as defined by the Americans with Disabilities Act {ADA}), gender, sexual orientation, veteran status, or any other protected class under State and/or Federal law except where there is a bona fide occupational qualification. Furthermore the City will take affirmative action to ensure that applicants and employees are treated without regard to these characteristics during the recruitment process or any subsequent appointment with the City of Milwaukie.

Guidelines for UseApplications:

All persons applying for employment must submit a city employment application and any requested supplemental materials within the timeframe specified. Applications will only be accepted for positions for which there is a current recruitment process. Application and supplemental materials shall be considered confidential.

Internal versus External Recruitments:

Recruitments may be limited to internal or may be run externally. When run externally, current employees are still encouraged to apply. Determination of whether to use an internal versus external selection process may consider any of the following criteria, but this listing shall not be considered exclusive: (1) existence of a career ladder; (2) pool of qualified internal candidates that possess the minimum skills necessary; (3) history of frequency of vacancies; and (4) current market conditions. City employees who are among the finalists may be given preference, if in the department heads and selection panel's judgment, they are at least as well qualified as any other finalist.

Advertisement:

This may include, but will not necessarily be limited to, internal job posting, the City's website, newspaper publications, public and private employment agencies, applicable professional organizations. When an external recruitment process is used, publicity will be conducted in such a manner and for a sufficient period of time to ensure an opportunity for the public to apply and to be considered for City employment.

Eligibility Lists:

At times eligibility lists may be used to fill vacant positions. Taken into consideration are the number of persons who successfully passed all steps in the most recent recruitment for the position and length of time since the last recruitment.

Selection Methods:

Any combination of the following methods may be used to determine whether applicants meet or exceed the minimum qualifications listed in the class specification: completed application; written, performance, physical or psychological examination; individual or group examination; assessment center; information provided by references; pre-employment drug screen; background check; or other job related screening techniques. This should not be considered an exhaustive list. An applicant must meet or exceed the minimum qualifications of the position as stated on the classification specifications in order to move forward in the selection process. If, due to market conditions, there are an insufficient number of applicants who meet the minimum qualifications, the hiring manager, in conjunction with the Human Resources Director, may modify the requirements and the selection procedure or may decide to under fill the position with a lower level classification of a trainee position.

Reference Checks:

To ensure that individuals who join the City are well qualified and have a strong potential to be productive and successful, it is the policy of the City to check the employment references of all final applicants being considered for employment. These verifications are generally handled through Human Resources, unless an alternative has been agreed to with the hiring manager. All applicants must sign the application, which includes a release to conduct reference verifications and background investigations.

Only supervisors or Human Resources are authorized to provide references for former City employees and only after verifying that the requesting party has obtained an appropriate release from the previous employee. The reference shall be based on the respondent's good faith assessment of the employee's job performance.

Post Job Offer Pre-Employment Physical Screenings:

1. Drug tests: These are conducted on all applicants after a conditional offer of employment has been made. A positive drug screen will automatically disqualify an applicant for employment.
2. Pre-employment Physical Capacities Tests: For positions requiring a higher level of physical activity a job analysis is conducted by an outside agency to determine an appropriate pre-employment physical capacities test. If a position requires the employee to hold a CDL or use a respirator there is an additional required medical examination. Also medical examinations are conducted for Police Officer positions based on standards set by the Department of Police Standards and Safety Training (DPSST).

Background Investigations:

The City has a high commitment to its employees and citizens to provide a safe work environment and promotes high standards of employee fitness. The scope of the check required depends on the particular position or assignment. At a minimum a criminal history check and driving record check will be conducted for all applicants for employment and may be run on current employees if there is reason to suspect that such information has changed. The City Council has adopted the appropriate

Ordinance to authorize the Police department to conduct background checks on applicants to the City.

1. Driving Record: In general an applicant for a position where the person will be required to drive as part of the job will be disqualified if the person has more than 3 traffic tickets in the past three years and/or a DUII within the past 5 years. The HR director in consultations with the Department Director and Police representative checking the driving status reserves the right to use his or her discretion and use alternative criteria depending upon the particulars of the situation and the position involved.
2. Criminal History: Only convictions and not arrests will be considered. Expunged juvenile records will not be considered. The Human Resources Director in consultation with the Police representative conducting the criminal history check will review the criminal history and the nature of the position to determine if someone is qualified to perform the duties of the position. When reviewing a conviction record the following will be taken into consideration:
 - The nature, gravity and frequency of the offense.
 - The duties of the position the employee holds or is applying for.
 - The age of the individual at the time of the conviction.
 - The time that has passed since the conviction.
 - The employee's entire work record or the applicant's work qualifications in total rather than only one aspect of the individual's history.
3. Credit Record: The City reserves the right to conduct credit record checks on person who will be employed in the Police department or who will have greater access to City systems such as Finance and IST.

Disqualification of a Candidate:

Failure to successfully pass any portion of the screening process may be grounds for disqualification. If a finalist for a position fails to participate in any post job offer pre-employment physical screening or background investigation, when directed to do so it will be grounds for no longer being considered for the position.

Applicants whose criminal history investigation causes the City to question the applicant's suitability will be ineligible for hire. In addition, the following may also be grounds for disqualification:

- Conviction of a crime which in the City's judgment would render the person unfit to perform the duties of a particular position.
- Having used or attempted to use political influence or bribery to secure an advantage in obtaining appointment.
- Having made a false statement in the application or examination process.
- Having otherwise violated provisions of the City charter or any of the administrative policies or procedures.
- Failing to be promptly present at the time and place designated for any portion of the examination process.

Once hired a person must continue to meet the qualifications for the position.

Procedures

1. The hiring manager reviews staffing needs and availability of funding for the position.
2. The hiring manager and HR meet to address and establish recruitment and targeted outreach strategies for the position.
3. HR, in conjunction with the hiring manager, develops recruitment and selection tools.
4. The hiring manager reviews and approves content of position job announcement, supplemental questionnaire, and oral board selection materials.
5. The hiring manager will suggest potential oral board raters.
6. Human Resources will confirm and schedule the oral board interview panel.
7. Once the oral boards are complete, the hiring manager or department head will schedule and conduct an executive interview on the top candidate(s).
8. Human Resources or in some cases, the hiring manager, will conduct reference checks on the top candidate(s).
 - a. Verify that authorization exists to contact references and past employers.
 - b. Review application for work-related information to be asked during the reference check. If the hiring manager is conducting the reference check, he/she should obtain a list of potential questions from Human Resources.
 - c. Contact past employers to verify work history information on the application.
 - d. If the reference check reveals that a candidate knowingly provided false information on the employment application this will constitute grounds for disqualifying the applicant from further consideration for employment at the City.
9. Prior to making an offer of employment, the hiring manager will consult with HR to review information received in final interview, reference checks, and discuss terms of the job offer.
10. The hiring manager is authorized to give the first step of the salary range. Beyond that, the starting pay rate needs concurrence of the HR Director.
11. The hiring manager will extend an offer of employment to the successful candidate, contingent upon the candidate's successful completion of a pre-employment drug screen, background check or other applicable pre-employment exams.
12. Human resources will coordinate with the candidate and the testing facility for the candidate to take the pre-employment drug screen and any other applicable physical screenings and will verify the results of the pre-employment screen(s).
13. The hiring manager will determine the start date and notify Human Resources.
14. Human Resources will document the hire information on a Personnel Action form, schedule the new employment orientation, and obtain necessary required documentation for employment.
15. Appointments made at entrance or promotion, or upon reinstatement or reemployment to a position shall be considered probationary appointments.

Responsibilities

Human Resources:

- Develop the recruitment process in conjunction with the hiring manager.
- Ensure that there is an accurate classification specification for the position.

- Oversee the recruitment and selection process. Develop recruitment materials, advertise the position, develop selection criteria and process.
- Obtain all necessary authorizations and releases prior to sending an applicant or employee to a drug screen or other background check(s).
- Coordinate the tests and screenings.
- Maintain the confidentiality of all records and results of any screenings listed in this policy.
- Follow proper notification requirements under the Fair Credit Reporting Act (FCRA). These include providing the applicant or employee with a notice of the decision not to hire or other employment action, a copy of the report, and a copy of his/her FCRA rights before the adverse action is taken.
- Maintain results of criminal history, credit history, and driving record in sealed confidential files.
- Maintain the results of the drug screens in medical files for the respective employee separate from the employee's personnel file.

Hiring Manager:

- Confirm the budget or funding sources available for hiring.
- Initiate a request for recruitment.
- Review the classification specifications for the position for any changes or revisions.
- Work in conjunction with Human Resources to develop and review the recruitment and selection methods and tools.
- Make all job offers contingent upon successful completion of the drug screen and required background check(s).
- Inform a potential employee that a job offer is being made contingent upon successfully passing the required screenings.
- Maintain the confidentiality of all records and results of any screenings listed in this policy.

Police Department:

- Conduct the background, driving record, criminal history check and /or credit history check.

Applicant and Employee:

- Be truthful in the completion of all materials for employment.
- Sign appropriate authorizations and releases for the screenings to be performed.
- Participate in a screening when directed to do so or recognize that he or she may be forfeiting the position.
- All City employees are required to report all criminal convictions to the HR Director or supervisor the first working day following the conviction.

Attachments

The Federal Fair Credit Reporting Act Disclosure Statement
Post Job Offer/Pre-Employment Screenings

Post Job Offer/Pre-Employment Screenings

Position	Drug Screen	Pre-employment Physical	DMV Check	Criminal History Check	Comprehensive Background Check	Credit Check
All Positions	Yes		Yes	Yes		
Police dept Personnel	Yes	Yes	Yes	Yes	Yes	Yes
Dept Directors	Yes		Yes	Yes		
Finance Employees	Yes		Yes	Yes		Yes
IST Employees	Yes		Yes	Yes	Yes	
Library Employees	Yes		Yes	Yes		
Public Works Employees including mechanics	Yes	Yes				

SUBJECT: **New Employee Orientation**

Effective Date: **July 1, 2003**

Purpose

To ensure a smooth transition to the City of Milwaukie for all newly hired employees.

Definitions

New employee orientation: A process by which a new employee becomes familiar with the policies and procedures of the workplace.

Scope

All new employees.

Policy

All new employees must attend an orientation session. During the orientation session, the employee will receive a copy of the Administrative Procedures, information on benefits, and other applicable materials pertaining to employment at the City and the use of City computers. The employee will be given an opportunity to ask questions about any of this information. Also all supervisors of new employees will cover items on the attached orientation sheet with employees during their first 30 days of employment.

Procedures

Prior to the employee's first day:

1. The supervisor will notify Human Resources (HR) of the starting date for a new employee.
2. The HR Assistant will notify Information Systems Technology (IST) of the need for phone and computer hook up.
3. The supervisor will notify facilities of new hire to activate card key (where applicable).
4. HR will contact the new employee's supervisor to set a date and time for the orientation.

At time of hire:

1. HR will conduct a new employee orientation with the employee.
2. HR will send a copy of the department orientation checklist to the employee's supervisor and will provide a copy to the employee at orientation.
3. The supervisor should see that all items are reviewed with the employee within the first thirty (30) days of employment.
4. Once completed the employee and supervisor sign the form and return to HR for inclusion in the employee's personnel file.

Responsibilities

Orientation is the joint responsibility of the new employee's supervisor and Human Resources.

Human Resources

- Providing new employees with an overview of the organization's policies,

procedures, and benefits.

The new employee's supervisor

- Ensuring that each employee attends an orientation session.
- Reviewing all items on the attached orientation sheet with the employee during their first thirty (30) days of employment.
- Conducting the job training or delegating that responsibility to co-workers or by signing the employee up for classes.
- Talking often with new employees during the first few weeks of their employment.

Attachments

New Employee Orientation Checklist

Cross Reference

Error! Hyperlink reference not valid.

New Employee Checklist

NAME: _____ DATE OF HIRE: _____ SUPERVISOR: _____

Directions: Please initial as you go over each item with a new employee. For the equipment checkout portion, please record applicable item numbers and dates checked out. **Any change in equipment will need to be reported in e-mail or in writing to the HR office.** The employee will be responsible for the last known item on file.

Each element needs to be covered within the **first 30 days** of employment. Once the supervisor and the employee have signed, acknowledging the discussion of each item, the form should be submitted to HR as soon as possible.

DAILY ROUTINE

- _____ Schedule
- _____ Parking
- _____ Breaks and Lunch
- _____ Restrooms
- _____ Smoking Locations
- _____ Dress Code/Uniform

Office equipment/Communication tools

- _____ Bulletin Boards
- _____ Copy Machine
- _____ Computer Access
- _____ Phone and Voicemail
- _____ Files
- _____ Office Supplies
- _____ Recycling

EQUIPMENT

- _____ Keys (list _____)
- _____ Employee Badge/Key Card
- _____ Cell Phone
- _____ Pager
- _____ Uniform (specify _____)
- _____ Other (specify _____)

Payroll/Accounts Payable

- _____ Timesheets
- _____ Overtime and Approval
- _____ Petty Cash
- _____ Procurement Cards
- _____ Mileage Reimbursement
- _____ Boot/Clothing/Equipment Allowance

General Safety and Health

General Safety Policy

- Overview
- Employee’s Safety Responsibilities
- Access to Medical Exposure Records
- Safety Committee Role
- Right-to-Know Station/MSDS Sheets
- Safety Thank You
- Accident Reporting and Investigation
- Emergency Action – Fire Prevention
 - Building Evacuation
 - Building Emergency Coordinator
 - Fire Extinguisher Locations
 - *Fire Extinguisher Training**
 - First Aid Kit

Job Specific

- *General Safety Hazards (tools, etc)**
- *Personal Protective Equipment**
 - Location
 - Use of
 - How to get it
- *Respirators**
- *Confined Space**
- *Bloodborne Pathogens**
- *Mail Handling**
- *Lockout/Tagout**

***Note: ON THESE TOPICS, PLEASE PROVIDE AN OVERVIEW OF THE POLICY IF IT APPLIES TO THE DEPARTMENT AND ENROLL THE NEW EMPLOYEE IN THE NEXT AVAILABLE TRAINING.**

The Position

- | | |
|--|--|
| Organizational Structure of the Department | Job Duties & Expectations |
| Meet the Staff | Performance Evaluation |
| Vacation Scheduling Process | Measuring Performance |
| Calling in Sick—What to Do | Six-month Goals & Objectives |
| | Review of 1 st Job Assignment |

Date

Employee Signature

Supervisor Signature

Received by HR
Date

CITY OF MILWAUKIE

CLASSIFICATION: LIBRARIAN

Department: Library Grade Number: 10(60) FLSA: Non-exempt
 Location: Milwaukie Ledding Library Union: AFSCME EEO Category: 2- Professional

DESCRIPTION:

This position performs a variety of technical and professional tasks relative to the assigned area of responsibility within the library such as children's library, reference, or technical services. The incumbent participates in all work activities of that area of responsibility including such activities as selecting and cataloging various collections, developing and conducting special programs and providing reference assistance to patrons. May oversee and have lead worker responsibility over the work of volunteers and other paid staff.

DUTIES AND RESPONSIBILITIES:

(Tasks listed are intended to be descriptive and not restrictive. An employee in this classification may perform any of the tasks listed; however, these examples do not include all the tasks which an employee may be expected to perform.)

ESSENTIAL DUTIES AND RESPONSIBILITIES:

1. Selects and catalogs the general collection of books, periodicals, pictures, tapes, disks, newspapers, manuscripts, pamphlets and other items contained in the library; reviews and keeps abreast of major selection tools; prepares library purchase orders; reviews books, periodicals and collections which are outdated or not used, and recommends removal and disposition.
2. Inspects new collection material upon arrival for quality and financial control purposes.
3. Creates, organizes and conducts special programs for patrons.
4. Provides outreach services to patrons or local organizations who do not have ready access to the library.
5. Provides reference and information assistance to library patrons; locates books and other materials, instructs and assists patrons in locating needed information utilizing a variety of media including the Internet.
6. Processes inter-library loans and provides reference service.
7. Performs a variety of record keeping functions including: preparing reports, maintaining necessary operating records, and monitoring assigned budget.
8. May act as supervisor for the library in the Library Director's absence.
9. Administers various special library activities throughout the year, such as reading programs, and other special programs for patrons.
10. Performs a variety of miscellaneous duties such as making logistical arrangements for programs.
11. Promotes interest in library programs through publicity, program brochures, cooperation with various community groups, and public contacts; speaks before citizen groups, students and other business and civic organizations.
12. May assist in the design and maintenance of the library's web page.
13. Participates in the library's public relations efforts and represents the library before community

LIBRARIAN

PAGE 2 OF 3

groups and organizations.

14. May represent the library on network committees.
15. Maintains positive public relations with customers and is responsive to customer needs.
16. Develops safe work habits and contributes to the safety of self, co-worker and the general public.
17. Performs other duties as required.

JOB SPECIFICATIONS:

(Job preparation and prior work experience requirements are minimum standards. Other equivalent combinations of education, training and experience will be considered.)

1. Job Preparation:

a) Education:

- i) Bachelor's degree required with a Master's degree in Library Science preferred; or
- ii) Any equivalent combination of education and experience.

2. Prior Experience:

a) Work Experience:

- i) Three (3) years experience in library operations with at least two of those involving experience in the specialty area of assignment; or
- ii) Any equivalent combination of education and experience.

b) Necessary Knowledge, Skills and Abilities:

- i) Knowledge of the principles and practices of library and information science.
- ii) Knowledge of library collection classification and selection tools and techniques.
- iii) Knowledge of equipment and facilities required in a comprehensive library system.
- iv) Knowledge of the principles and practices of office management, and work organization.
- v) Ability to analyze and utilize a variety of reports and records.
- vi) Ability to classify and catalog library materials.
- vii) Knowledge of purchasing procedures.
- viii) Ability to assist library patrons in the effective use of complex information technology.
- ix) Ability to determine the reference and information needs of the community and make appropriate budgetary recommendations.
- x) Ability to develop and lead programs of general interest to patrons.
- xi) Ability to establish and maintain effective working relationships.
- xii) Ability to work as a team member.
- xiii) Ability to perform the essential functions of the job.

3. Special Requirements:

- a) Must be able to pass department's security clearance standards.

4. Tools and Equipment Used:

- a) Computer and printer, fax machine, scanner, and copy machines; computer software including MS based word-processing, and library automated systems, calculator, and telephones.

LIBRARIAN
PAGE 3 OF 3

5. Supervision:

- a) This is not a supervisory classification; however, may occasionally oversee or provide lead worker direction to paid staff and volunteers.
- b) Works under the general guidance of the Library Director.

6. Communications:

- a) Has frequent communication with staff, volunteers, and patrons.
- b) Communication is of a moderate complexity.

7. Cognitive Functions:

- a) Work is performed independently with occasional review.
- b) Precedent is often available for problems with moderate difficulty.

8. Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- a) Work is generally performed indoors in a library setting.
- b) There is some stooping and reaching involved in shelving materials.
- c) There is some lifting of book bags that may weigh up to 40 pounds.
- d) Evening work is required.

9. Resource Accountability:

- a) Has a moderate impact on equipment of a modest value.
- b) Has a moderate impact on the assigned area of the library collection.

The job classification description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Drafted: 03/17/95
Adopted: 04/17/95
Revised: 02/01/03
Revised: 11/30/04