



CIVIL SERVICE BOARD MEETING AGENDA

Date: April 19, 2018

OPEN SESSION 5:30 p.m.

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS: Chair, Andrea Gourdine; Vice Chair, David Jones; Lauren Baranco; Yvonne Hudson-Harmon; Christopher Johnson; Jeffrey Levin; Beverly A. Williams

STAFF TO THE BOARD: Ian Appleyard, HRM Director/Secretary to the Board
Michelle Meyers, Deputy City Attorney
Tabitha Pulliam, HRM Technician/Staff to the Board

OPEN SESSION AGENDA

ROLL CALL

1) OPEN FORUM

2) CONSENT CALENDAR:

ACTION

- a) Approval of Revised Classification Specification
 - Open Government & Legislative Services Coordinator
 - Budget & Management Analyst, Assistant

- b) Approval of Employee Request for Leave of Absence
 - City Attorney
 - Human Resources
 - Library
 - Police Department
 - Information Technology

3) OLD BUSINESS:

- a) Approval of March 15, 2018 Civil Service Board Meeting Minutes

ACTION

- b) Determination of Schedule of Outstanding Board Items

INFORMATION

- c) Update on Common Classification Study – Koff & Associates INFORMATION
- d) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDE's and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 INFORMATION

4) NEW BUSINESS:

- a) Quarterly Report per Section 3.04(f) of the Personnel Manual of the Civil Service Board (“Civil Service Rules”) Providing Status of All Classification Specifications Revisions Currently Under Review INFORMATION
- b) 3.04 (e) Appeal of Classification Study Results; 5.07 Appeal of Reassignment of Employee; 5.08 Appeal of Transfer of Employee (L. Spencer) ACTION
- Employee currently classified as an Aviation Assistant Marketing & Commercial Representative (PORT), appealing denial of request to be reclassified and circumstances of reassignment and transfer.

5) ADJOURNMENT

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, May 17, 2018. All materials related to agenda items must be submitted by Thursday, May 3, 2018. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandnet.com



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email civilservice@oaklandnet.com or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico civilservice@oaklandnet.com o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 civilservice@oaklandnet.com 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



CITY OF OAKLAND

MEMORANDUM

DATE: April 19, 2018

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specification for Open Government & Legislative Services Coordinator (formerly titled Open Government Coordinator)

Based upon a classification review at the request of the Office of the City Attorney, staff has proposed revisions to the Open Government Coordinator classification specification including a revised title: **Open Government & Legislative Services Coordinator**. The classification has not been revised since 2008.

The role of the classification has evolved since it was first created, no longer involving agenda management. The primary focus presently involves coordinating timely responses to public records requests. Further, the position will provide professional administrative support in the City Attorney's Office. There is one position in the department's budget and it is vacant. The revised specification will be used to initiate a recruitment to fill the vacant position in the near future.

The changes captured in the attached revised specification were made to accurately reflect the requirements of the position as in its current role. The changes include:

- Revision of the title to Open Government & Legislative Services Coordinator.
- The addition of professional administrative support language in the Definition Section.
- Changes to duty statements to reflect that the position coordinates public records requests, manages the on-line records request system/database, assists with records management and retention, and provides professional administrative support.
- Minor revisions to the Knowledge and Abilities section related to the position's role.
- Updating of the Minimum Qualifications to eliminate the agenda management component.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specifications revisions and title change. City staff and union representatives met on March 1, 2018 to discuss the changes. At a meeting on March 15, 2018, the union confirmed that they have no objections to the proposed revisions.

Additionally, no determination has been rendered regarding the "common class" status of this classification. The "Common Class" Project is currently underway, and more information will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed revisions and title change to the **Open Government & Legislative Services Coordinator** classification specification.

Attachments: Revised draft Open Government & Legislative Services Coordinator classification specification.



OPEN GOVERNMENT & LEGAL SERVICES COORDINATOR

Class Code: SC246 FTE

Civil Service

DEFINITION

Under general supervision in the Office of the City Attorney, the incumbent ~~ensures-works to~~ provide access to public information and records in compliance with state and local laws; ~~performs tasks involving City Attorney records, data and information related to the disclosure, timely publication and distribution of agendas and notices; and~~ performs related duties as assigned. ~~The incumbent may also perform professional and administrative work, including analysis, regarding public records, transparency of office policies, and operations.~~

DISTINGUISHING CHARACTERISTICS

This is a single incumbent position responsible for facilitating and assisting with the City's timely response to requests for public records and information under state and local laws including the California Public Records Act and the City of Oakland Sunshine Ordinance. ensuring that all departments and agencies comply with the Brown Act and the Sunshine Ordinance requiring timely publication and distribution of agendas and notices, timely response to requests for information and public records by outside citizens and agencies. The incumbent will conduct research, produce reports and other documents, and act as a representative of the City Attorney's Office regarding public records, the Brown Act and Sunshine Ordinance, City Council's Rules of Procedure, and other matters. This classification ~~which is exempt from the regulations of the Civil Service Board~~ performs duties ~~which that~~ involve the exercise of considerable discretion and latitude of judgment in the preparation and handling of highly sensitive and confidential materials.

This position ~~may~~ receives direction from the City Attorney or other management staff in the City Attorney's Office.

EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

- ~~Respond to eive~~ Public Records Requests for City Attorney records and information from outside agencies and the general public; consult with attorneys regarding potentially exempt records or information; eordinate response with departmental contact; provide advice and assistance; review records including confidential documents; conduct research and compile accurate and thorough reports; -consult with Deputy City Attorney regarding appropriateness of disclosure; communicate effectively with requestors regarding the scope of requests, production of records, and other issues; produce responses to requests for City Attorney records; prepare and send invoices for the cost of copies; maintain, track and archive requests and responses.
- Manage the City of Oakland's on-line records request system and database; act as a point of contact for other City Departments regarding legal and technical advice related to requests for records; facilitate records requests directed to other City Departments; produce and provide trainings and materials for City staff; serve as liaison to other City Departments including the

Open Government & Legal Services Coordinator

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Office of the City Clerk regarding records management and other issues.

- Perform administrative tasks involving City Attorney records, data, and information including records management and retention.
- Perform administrative tasks related to contracts, invoices, purchase orders, personnel records, financial records, and other documents.
- ~~Develop policies and procedures for public notice procedures for complying with public records requests as required by local and state laws.~~ Serve as the liaison to the Office of the City Clerk regarding ~~agenda items, public noticing procedures and~~ city-wide records and retention management. Research, compile and prepare a variety of reports, memoranda, and other communications.
- Provide advice, analysis, and assistance on tasks ~~Provide follow up and research on inquiries and problems~~ which~~that~~ require routine and specialized knowledge; provide information ~~which~~~~that~~ may require the use of judgment and the interpretation of City policies, procedures, and local and state laws.
- Initiate, and prepare, and coordinate, and present reports and other information presentations to members of the community, to the at City Council during Council/Committee meetings, and to City departments, and boards, and commissions regarding a variety of matters, including but not limited to annual reports, budget proposals, analysis, and review of records.
- Initiate and prepare biannual review of Conflict of Interest Code; coordinate departmental/agency updates; prepare ordinance; advise and respond to questions regarding positions and disclosure categories and submit for City Council approval. Lift, load, and unload boxes~~large stacks of documents~~ averaging 15-30 lbs. to and from transportable devices (i.e., dolly, cart, etc.).

KNOWLEDGE AND ABILITIES

Knowledge of:

- Sstate and local laws and relevant court decisions regarding the conduct of public meetings and the handling of government records and public documents and Public Records Requests (i.e., State of California The Brown Act, Public Records Act, and the City of Oakland's "Sunshine Ordinance");
- General governmental administration including functions and structure of City government~~municipal government administration, city legislation, elections, human resources, accounting, contracts~~ s laws, bond issues and other related matters~~activities~~;
- Legal processes, procedures and language for noticing of agenda items and disclosure of public information and records;
- Principles and practices of records management and retention systems;
- Basic and specialized computer applications and software;
- Customer service and community/public relations skills;
- Methods of research, analysis and preparation of written materials including reports,

Open Government & Legal Services Coordinator

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memoranda, and other forms of communications reports.

Ability to:

- Perform legislative duties under stressful circumstances where it is required to observe and enforce deadlines.
- Establish, evaluate, and implement administrative/operational policies, practices, and procedures.
- Read, interpret and apply state and local laws, court decisions, regulations, and other legal requirements.
- Analyze and solve problems of a complex nature; demonstrate critical thinking skills.
- Exercise sound judgment in stressful and difficult situations.
- Manage notices, agendas, and responding to public records requests; manage records and filing systems.
- Lift, load and unload boxes of documents weighing, up to 40 on average, 15-30 lbs.
- Communicate effectively in both oral and written form; make presentations.
- Research, analyze and prepare complex reports of a general or technical nature.
- Utilize a computer system and software applications including word processing, spreadsheet, and databases.
- Establish and maintain effective work relationships with those contacted in the performance of required duties; and prepare and analyze complex reports of a general or technical nature.

MINIMUM QUALIFICATIONS

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

Education:

A Bachelor's degree from an accredited college or university in public administration, business administration or a related field.

Experience:

Four years of progressively responsible experience related to public agency administration ~~entity~~ legislative processes such as agenda management, public records, municipal government legislation or comparable private sector work.

LICENSE OR CERTIFICATE

Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

OTHER REQUIREMENTS

Open Government & Legal Services Coordinator

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Bilingual skills in English and a non-English Language, especially in Spanish, Cantonese and/or Mandarin, are highly desirable.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY

Established: 3/06/2008 CSB Resolution #: 44514 Salary Ordinance #:
Exempted: Y N Exemption Resolution #: 77183

Revision Date: n/a CSB Resolution #:
Re-titled Date: n/a CSB Resolution #: Salary Ordinance #:

(Previous title(s): n/a)



MEMORANDUM

DATE: April 19, 2018

TO: The Honorable Civil Service Board **FROM:** Jaime Pritchett
Principal Human Resource Analyst

THROUGH: Ian Appleyard, Director of Human Resources Management
Secretary to the Board

SUBJECT: Approval of Revised Classification Specification for Budget & Management
Analyst, Assistant (formerly titled Assistant Budget Analyst)

Based upon a classification review at the request of the Finance Department, staff has proposed revisions to the Assistant Budget Analyst classification specification including a revised title: **Budget & Management Analyst, Assistant**. The classification was established in 2003.

The Finance Department is in the process of reorganizing the work that is performed by Budget Bureau staff. The Assistant Budget Analyst is an existing classification that is being overhauled and retitled to align with the new vision for the bureau. A new Budget & Management Analyst series is currently under development, which will include additional levels in the series. The rest of the series will be brought to the Board for approval at an upcoming meeting.

Budget & Management Analyst, Assistant is the entry-level classification in the series. The classification will be responsible for assisting with the review and analysis of the City's operating and Capital Improvement Program (CIP) budgets and performing basic research for reports, major projects, and program evaluations.

The most significant change is to the Minimum Qualifications section. The requirement for an Associate's Degree and two (2) years of experience has been modified to a Bachelor's Degree and no experience, with one (1) year of experience being highly desirable.

There is one position in the department's budget and it is vacant. The revised specification will be used to initiate a recruitment to fill the vacant position in the near future.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specifications revisions and title change. City staff and union representatives met this year on March 1st and March 15th to discuss the changes. In an email dated March 29, 2018, the union confirmed that they have no objections to the proposed revisions.

Additionally, no determination has been rendered regarding the "common class" status of this classification. The "Common Class" Project is currently underway, and more information will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed revisions and title change to the **Budget & Management Analyst, Assistant** classification specification.

Attachments: Revised draft Budget & Management Analyst, Assistant classification specification.



BUDGET AND MANAGEMENT ANALYST, ASSISTANT

**DRAFT to CSB
2018-03-02**

Class Code: AF055 FTE Civil Service Classified

DEFINITION

Under general supervision in the Finance Department, assists in the review and analysis of the operating and Capital Improvement Program (CIP) budgets; performs basic research for reports, major projects and program evaluations; and performs related duties and administrative functions as assigned.

~~Under direct supervision in the Budget Division of the Office of the City Manager, assists in the development and maintenance of the City's budget; provides general assistance in reviewing and analyzing budget documents and reports for accuracy and format; utilizes a variety of computer software in developing and designing reports, documents and templates for financial data; prepares City Budget documents for City website; performs related duties as required.~~

DISTINGUISHING CHARACTERISTICS

This is an entry level classification in the Budget and Management Analyst series. This classification is distinguished from the higher-level Budget and Management Analyst in that the incumbent of the latter performs the full range of analytic functions in support of departments and city operations.

The incumbent receives direction from the Budget Administrator, Assistant Budget Administrator, Principal Budget and Management Analyst, or Senior Budget and Management Analyst.

~~This is a para-professional position in the Budget Office. The incumbent assists in the review, analysis and production of budget documents and reports. The incumbent performs specific duties of a limited nature within established procedures and guidelines. This classification is distinguished from the Budget and Operations Analyst which performs a broader range of analytical duties with a greater degree of responsibility and independence.~~

~~The incumbent receives direct supervision from the Budget Director, Principal Financial Analyst or Budget & Operations Analyst III and may receive lead direction from the Budget and Operations Analyst.~~

EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

Assemble, prepare, and publish the budget book, master fee schedule document, five year forecast document, and other publications of the Budget Bureau and Finance Department as directed. And coordinate the assembly of data, narrative, tables, and supporting documents for those same publications.

Conduct or assist in conducting studies and surveys; collect information for operational and financial problems; compile and analyze information; prepare and present recommendations for review by management. Identify sources for further research, conduct basic research, collect and analyze data.

Assist in the preparation of the annual operating and capital improvement budgets; may review requests for additional funding and other supplemental requests; assist in monitoring and controlling budget activities.

Perform administrative functions in support of the Budget Bureau and Finance Department, including: procurement of supplies, materials and services; maintenance of internal and external web pages; developing, maintaining, and improving tracking mechanisms for forms and documents; preparing official communications, agendas, and minutes; and assisting with scheduling and project management.

Prepare, reconcile, validate, and format raw data for reporting and analysis in support of the Finance Department, City fiscal staff, and the public.

Conduct or assist in policy and management analysis projects, processes improvement studies and organizational and legislative reviews.

Provide accurate data and analysis for use in forecasts, budget documents, projects, reports, and program evaluations.

Use software applications and the City's automated financial system extensively to develop budget book material and other budget-related presentations.

~~Assist in reviewing annual departmental budget proposals for compliance with the City's budget policies, City Council goals, department goals, and revenue estimates.~~

~~Assist in the production of a variety of documents including the City Manager's Proposed, Adopted Budget, semi-annual reports for the City Manager's Office on departmental performance and the Master Fee Schedule for the general public and inter-City use.~~

~~Create a variety of templates in a variety of systems for financial reports, forms and data; compile submitted data, standardize format and review data for appropriateness.~~

~~Prepare and coordinate budget documents for City website; serve as liaison with web master.~~

~~Assist in gathering and reviewing information for formal studies of policy, managerial, operational, and budgetary issues at the request of the City Manager's Office.~~

~~Correct or require departments to correct negative project carry forward balances and negative available balances due to over-expenditures.~~

~~Maintain the computerized budget system, including the City's baseline budget, changes to appropriations, control of user access, and maintenance of benefit and salary tables.~~

~~Provide general office and administrative support including customer service response, maintenance of schedules and calendars, ordering of supplies, processing of general accounting and payroll items.~~

KNOWLEDGE AND ABILITIES

Knowledge of:

- Principles and methods of public agency accounting and budgeting.
- Financial and statistical analysis and research techniques.
- Strategic planning principles and techniques.
- Survey techniques, productivity analysis methods, and statistics.
- Organizational systems and processes.
- Computer applications for word processing, spreadsheet analysis, database management, graphics, and financial management.
- ~~Working knowledge of microcomputers software for desktop publishing, word processing, spreadsheet analysis, database management, graphics and financial management.~~
- ~~Working knowledge of standard office equipment including personal computer and their applications, facsimile and recording equipment.~~
- ~~Working knowledge of modern office administrative practices and procedures, including records management.~~
- ~~Working knowledge of correct English usage including spelling, grammar, punctuation, and vocabulary; editing.~~
- ~~Working knowledge of public service and contact philosophy and techniques.~~

Ability to:

- Analyze and synthesize technical reports, apply research and statistical techniques, and formulate recommendations.
- Prepare formal reports and assist in making presentations.
- Utilize computer software to process, analyze and present data; utilize software applications including word processing, spreadsheet analysis, database management, graphics, and financial management.
- Apply familiarity with general municipal operations and to identify sources and contacts for information.
- Apply basic strategic planning principles and techniques as directed.
- Communicate effectively orally and in writing.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

~~Ability to meet short deadlines and deal with high levels of stress.~~

~~Ability to utilize a wide variety of computer software including desktop publishing, spreadsheets, database systems, word processing, BRASS and Oracle applications.~~

~~Ability to use initiative and independent judgement within established guidelines; plan, organize and schedule work and set priorities.~~

~~Ability to understand the organization and operations of the City and outside agencies as necessary to assume assigned responsibilities.~~

~~Ability to exercise judgment, initiative, tact, courtesy and discretion in dealing with other departments, City officials, outside agencies and the public; maintain confidential data and information; maintain effective work relationships with those contacted in the performance of required duties.~~

~~Ability to prepare and present reports and information in both oral and written formats; follow oral and written directions.~~

MINIMUM QUALIFICATIONS

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

Education:

A Bachelor's degree from an accredited college or university with major coursework in accounting, finance, business administration or related field. Equivalent to completion of an Associate degree with major coursework in accounting, finance, business administration or related field. Experience may be substituted for education on a year for year basis.

Experience:

None required. One year of experience in the analysis of budgets, management operations, government programs, statistics, economics, public policy, legislation or systems is highly desirable. Two years of increasingly responsible experience in municipal government budget development.

LICENSE OR CERTIFICATE

An incumbent in this position is expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be an efficient method for traveling to required locations. An individual appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

~~Incumbent in this position is expected to operate automotive vehicles in the performance of assigned duties. Due to assignments and hours worked, public transportation may not be an efficient method for traveling to required locations. Individuals appointed will be required to maintain a valid California Driver's License while employed.~~

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY

Established: 11/03/2003 CSB Resolution #: 12548 Salary Ordinance #:
Exempted: Y N Exemption Resolution #:

Revision Date: / / CSB Resolution #:
Re-titled Date: / / CSB Resolution #: Salary Ordinance #:

(Previous title(s):)



MEMORANDUM

DATE: April 19, 2018

TO: The Honorable Civil Service Board

FROM: Jaime Pritchett, Principal HR Analyst, Recruitment & Classification / Staff to the Board

THROUGH: Ian Appleyard, HRM Director / Secretary to the Board

SUBJECT: Request Authorization for Employee Requests for Leave of Absence

HRM is in receipt of six (6) Unpaid Leave of Absence requests pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

Employee Name	Classification	Department	Leave Duration	Category
Early, Shavonda	Legal Administrative Assistant	City Attorney	April 23, 2018 – open	CSR 8.07 (c) (v) Accept Exempt Position
Mehari, Miriam	Information Systems Administrator	Information Technology	April 23, 2018 – April 23, 2019	CSR 8.07 (c)(iii) Personal Business
Sadl, Virginia	Criminalist II	Oakland Police Department	March 27, 2018 – December 31, 2018	CSR 8.07 (c)(iii) Personal Business
San Miguel, Silvia Sofia	Program Analyst I	Human Resources	April 9, 2018 – June 30, 2018	CSR 8.07 (c)(vi) Retain seniority rights
Shen, Alex	Librarian Aide	Oakland Library	May 1, 2018 – May 18, 2018	CSR 8.07 (c)(iii) Personal Business
Sidney, Ametrius	Police Communications Supervisor	Oakland Police Department	April 07, 2018 – open	CSR 8.07 (c) (v) Accept Exempt Position

RECOMMENDATION:

Staff recommends that the Civil Service Board approve the requested Leaves of Absence.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Paternity Leave (no pay)

Employee's Name Shavonda Early Employee's ID 13870 Today's Date 03-27-18

Department/Division City Attorney's Office Employee Job Title Legal Admin. Asst.

I Request: N/A Days Hours From 4/23/2018 To open
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave ANP
(Write appropriate code)

Comparison of Different Leave Types <i>N/A - See Attachment</i>					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No*	Maternity Leave

*** Additional Information**

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Shavonda Early 3-27-18
 Employee's Signature Date

 Civil Service Board Approval Date

Paul J. [Signature] 3/27/18
 Department Head Approval Date

 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Maternity Leave (no pay)

Employee's Name MIRIAM MEHARI Employee's ID 15885 Today's Date 4/2/18

Department/Division INFORMATION TECHNOLOGY Employee Job Title INFORMATION SYSTEMS ADMINISTRATOR

I Request: 365 Days Hours From Apr 23, 2018 To 4/23/19
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No *	Maternity Leave

*** Additional Information**

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Miriam Mehari 4/2/2018
 Employee's Signature Date

 Civil Service Board Approval Date

[Signature] 4/19/18
 Department Head Approval Date

 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)

Employee's Name Virginia Sadl Employee's ID 22617 Today's Date 3/22/18

Department/Division Oakland Police Dept/Criminalistics Employee Job Title Criminalist II

Request: 4 Days Hours From March 27, 2018 To Dec 31, 2018
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)

*** Additional Information**

Employees on ANP, MNP, and SLV may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Virginia Sadl 22-Mar-18
 Employee's Signature Date

Carrie E. Truffet 3-26-2018
 Department Head Approval Date

 Civil Service Board Approval Date

 Office of the City Administrator Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Administrator approval is required for leave of 5 days or more for exempt employees.

CITY OF OAKLAND

Memorandum

TO: Chief of Police/ City Administrator
FROM: Criminalistics Division
DATE: March 22, 2018

RCVD 30MAR'18 10:46:27

PERSONNEL

RE: Unpaid Leave of Absence Request for Virginia Sadl

I would like to request an unpaid leave of absence for 4 days during the time frame of March 27, 2018 to December 31, 2018.

The purpose of this leave is to testify as an expert witness for forensic casework that was previously performed for my former employer, the Serological Research Institute (SERI). The advance request is being made with relatively short notice given only a range of testimony dates was known for the trial to begin. The date of my testimony wasn't confirmed until now.

I have attached the required Unpaid Leave of Absence Form.

Thank you for your consideration of this unpaid leave of absence request.



Virginia Sadl
Criminalist II

22-March-18
Date



Sandra Sachs
Acting Laboratory Manager

23 March 18
Date



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Paternity Leave (no pay)

Employee's Name SILVIA SOFIA SAN MIGUEL

Employee's ID 15409

Today's Date MARCH 19, 2018

Department/Division HUMAN RESOURCES MANAGEMENT

Employee Job Title PROGRAM ANALYST I

I Request: 83 Days Hours From APRIL 9 To JUNE 30
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No*	Maternity Leave

*** Additional Information**

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

March 19, 2018

Employee's Signature

Date

Civil Service Board Approval

Date

3/20/18

Department Head Approval

Date

City Manager Approval

Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Maternity Leave (no pay)

Employee's Name Alex Shen Employee's ID 21763 Today's Date 3-16-18

Department/Division Oakland Public Library Employee Job Title Librarian Aide

I Request: 67.5 hrs. Days Hours From 5-1-18 To 5-18-18
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
P	1 year	No	No	No *	Maternity Leave

* Additional Information

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Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Alex Shen 3-16-18
Employee's Signature Date

Civil Service Board Approval Date

J. Frubak 3/23/18
Department Head Approval Date

City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Maternity Leave (no pay)

Employee's Name Sidney, Ametrius Employee's ID 2838 Today's Date 3/27/18

Department/Division Oakland Police Department Employee Job Title Police Communications Supervisor

Request: Unknown Days Hours From 07 Apr 18 To _____
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Accrue Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
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*** Additional Information**

Employees on ANP, MNP, SLV or Maternity leave may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid maternity, an employee may take up to a maximum of 5 months leave.

Ametrius Sidney 27 MAR 18
 Employee's Signature Date

 Civil Service Board Approval Date

Lucas E. King 3-30-2018
 Department Head Approval Date

 City Manager Approval Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.

CITY OF OAKLAND

Memorandum

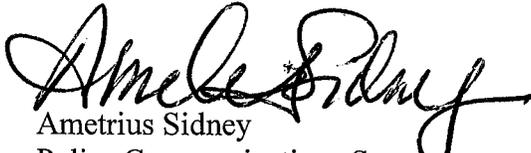
To: Department of Human Resources Management
Attn: Director Ian Appleyard
From: Oakland Police Department
Date: 27Mar18

Re: Request for Leave of Absence from Civil Service

RECEIVED
DEPT OF HUMAN RESOURCES
MANAGEMENT
18 MAR 28 AM 10:14

Pursuant to Civil Service Rule 8.08(c)(v), I am requesting a leave of absence from my Civil Service classified position of Police Communications Supervisor to accept the appointment to the exempted position of Fire Communications Manager with an effective date of 07Apr18

Thank you for your consideration in this matter.


Ametrius Sidney
Police Communications Supervisor
Oakland Police Department



CIVIL SERVICE BOARD MEETING MINUTES - DRAFT

Date: March 15, 2018

OPEN SESSION 5:30 p.m.

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

BOARD MEMBERS: Chair, Andrea Gourdine; Vice Chair, David Jones (Absent); Lauren Baranco (Absent); Yvonne Hudson-Harmon; Christopher Johnson; Jeffrey Levin (Arrived 5:45); Beverly A. Williams

STAFF TO THE BOARD: Ian Appleyard, HRM Director/Secretary to the Board
Tabitha Pulliam, HRM Technician/Staff to the Board
Michelle Meyers, Deputy City Attorney
Jaime Pritchett, Principal Analyst/Staff to the Board

CLOSED SESSION (CANCELED)

ROLL CALL

The Civil Service Board will now Convene in Closed Session and will Report Out any Final Decisions in Open Session Before Adjourning the Meeting pursuant to California Government Code Section 54957.6:

- 1) 3.04 (e) Appeal of Classification Study Results (L. Spencer) Employee currently classified as an Aviation Assistant Marketing & Commercial Representative (PORT), appealing the results of a Classification Study.**

OPEN SESSION AGENDA

- 2) REPORT OF ACTIONS TAKEN IN CLOSED SESSION**

ADJOURNMENT

NOTE: Closed Session Meeting Canceled

OPEN SESSION AGENDA

ROLL CALL

- 3) OPEN FORUM:**

There were no speakers in open forum.

- 4) CONSENT CALENDAR:**

- a) Approval of Ratification of Provisional Appointment
 - Project Manager
- b) Approval of Revised Classification Specification
 - Parking Meter Collector Supervisor
- c) Approval of Employee Requests for Leave of Absence
 - Library

44882 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Williams to approve the Ratification of Provisional Appointment, Revised Classification Specification and the Request for Leave of Absence. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Hudson-Harmon, Johnson, Williams
Board Member Noes: None
Board Member Abstentions: None
Board Members Absent: Baranco, Jones, Levin

5) OLD BUSINESS:

- a) Approval of February 15, 2018 Civil Service Board Meeting Minutes

44883 A motion was made by Board Member Johnson and seconded by Chairwoman Gourdine to Approve the February 15, 2018 Board meeting minutes. The motion passed.

Votes: Board Member Ayes: 2 – Gourdine, Johnson
Board Member Noes: None
Board Member Abstentions: Hudson-Harmon, Williams
Board Members Absent: Baranco, Jones, Levin

- b) Determination of Schedule of Outstanding Board Items

Report received and filed

- c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

Report received and filed

Note: Board Member Levin arrived at 5:45 p.m. He suggested that the Human Resources Department and the Unions explore the possibility of utilizing temporary hires to fill temporary vacancies; he further highlighted the benefit of having current employees be appointed in an

acting capacity to fill higher level positions and that the lower positions should be backfilled with temporary employees.

6) NEW BUSINESS:

- a) Informational Report on Human Resources Recruitment Timeframes for Classified, Exempt and Sworn Positions

Report received and filed

Note: Board Member Levin communicated his concerns related to recruitment time frames, which included his suggestion that staff try to identify bottlenecks in the process and where they occur in the life cycle of a vacancy from start to hire.

7) ADJOURNMENT

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, April 19, 2018. All materials related to agenda items must be submitted by Thursday, April 5, 2018. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board
150 Frank H. Ogawa Plaza, 2nd floor
Oakland, CA 94612
civilservice@oaklandnet.com



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email civilservice@oaklandnet.com or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico civilservice@oaklandnet.com o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 civilservice@oaklandnet.com 或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



**CIVIL SERVICE BOARD
APPEALS & HEARINGS CALENDAR
PENDING LIST – April 19, 2018**

1. OPEN

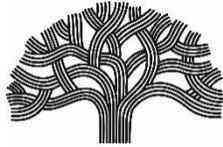
Case Number	Classification	Dept.	Action Pending	Date Received	Notes
OPD-2015-AP03	Complaint Investigator II (Urbi)	Citizens' Police Review Board	6.05 Appeal of Probationary Removal/Demotion	Oct 26, 2015	Hearing scheduled for May 17 th meeting.
OPD-2016-AP01	Police Service Technician II (Calvin)	Police	10.03 Appeal of Discipline	Dec 15, 2016	Briefs submitted Feb 10th with arbitrator's decision expected in 30-90 days.
PORT-2017-AP01	Port Utilities Supervisor (Zabb-Parmley)	Port of Oakland	10.03 Appeal of Discipline	June 7, 2017	Hearing scheduled for May 17 th meeting.
OFD-2017-AP01	Firefighter (Mendoza)	Fire	6.05 Appeal of Probationary Removal/Demotion	6/18/2017	Arbitrator selected; establishing hearing date.
PORT-2018-AP01	Aviation Assistant Marketing & Commercial Representative (Spencer)	Port of Oakland	3.04 (e) Appeal Regarding Changes in Classification	12/27/2017	Hearing scheduled for April 19 th meeting.

2. OTHER PENDING ITEMS

Date Requested	Subject	Report From	Date Due
February 15, 2018	Update on Common Classification Study	Port	Koff & Associates presentation Scheduled for April 19 th meeting.

3. CLOSED

Case Number	Classification	Dept.	Action Pending	Date Received	Notes



CITY OF OAKLAND

STAFF REPORT

DATE: April 19, 2018

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Jaime Pritchett, Acting HR Manager, Staff to the Board

THROUGH: Ian Appleyard, HR Director, Secretary to the Board

SUBJECT: TEMPORARY EMPLOYEES – Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of All ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

SUMMARY

Staff has prepared this report to provide the Civil Service Board with an update on compliance with the Civil Service Rules related to temporary employees since the last report at the March 15, 2018 meeting that referenced data as of February 9, 2018. This report focuses on temporary employees in the categories of Exempt Limited Duration Employees (ELDEs) and Temporary Contract Service Employees (TCSEs), who are currently employed in the City of Oakland.

As of March 9, 2018, there are a total of forty-five (45) employees in the TCSE (14), TCSE/Annuitant (18), and ELDE (13) categories. Six (6) assignments were closed, and four (4) new assignments were added. Of the total, there are zero (0) assignments reported as non-compliant with Rule 5.06.

Reports showing all the temporary assignments discussed in this report are included in a list (*Attachment A*) and a chart of trends (*Attachment B*) attached to this narrative report to provide a snapshot of the overall changes month to month.

BACKGROUND

The use of temporary employees is allowed under Civil Service Rule 5 (Certification and Appointment) in recognition that standard Civil Service employment practices can be cumbersome when a time-sensitive assignment arises or existing resources do not fit a specific need. Pursuant to the Civil Service Rules, Section 5.06 governing temporary assignments, ELDE assignments may not exceed one year and TCSE assignments may not be “ongoing or repetitive.”

STATUS OF NONCOMPLIANT ASSIGNMENTS

Of the total forty-five (45) temporary assignments, we are reporting zero (0) in this period as out of compliance with Rule 5.06.

RECOMMENDATION

Staff recommends that the Civil Service Board accept the monthly report on temporary assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs).

For questions regarding this report, please contact Jaime Pritchett, Recruitment & Classification at (510) 238-4735.

Attachments:

- A. TCSE/ELDE Report: For Payroll Reporting March 9, 2018.
- B. TCSE/ELDE Compliance Trend Chart: As of March, 9, 2018.

**CIVIL SERVICE BOARD
APRIL 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

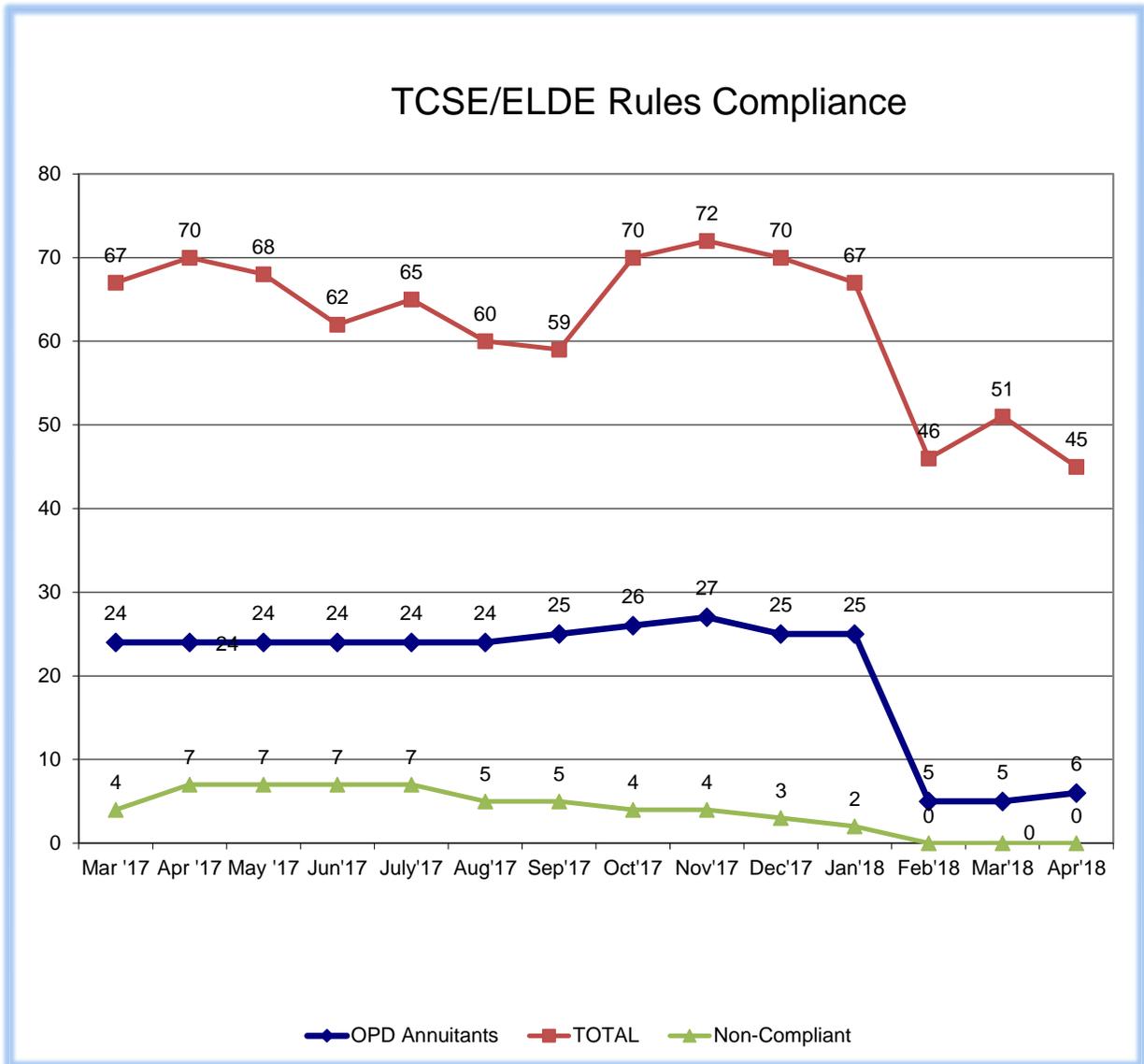
DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	NOTES	STATUS
CLOSED THIS PERIOD (6)							
CITY ADMINISTRATOR	Gennino	Angela	02111 - Administration Unit	10/23/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website.	SEPERATED
CITY ADMINISTRATOR	Krishnamurthi	Niranjan	02111 - Administration Unit	9/27/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website.	SEPERATED
FIRE	Fairley	Helen	20251 - Fire Communications Unit	9/18/2017	TCSE/ Annuitant	Temporary Senior Dispatcher; recruitment underway; est. completion 11/10/17	SEPERATED
HOUSING & COMMUNITY DEV.	Dizon	Benjamin	89939 - Municipal Lending	2/27/2017	TCSE/ Annuitant	Providing training to new staff.	SEPERATED
HUMAN SERVICES	Hernandez	Thea	78231 - Head Start Program	9/25/2017	ELDE	Pending Salary Ordinance amendment; December 2017	PERMANENT
HUMAN SERVICES	Scheider	Holly	78251 - Youth Services	12/4/2017	ELDE	Temporary support to the newly created Sugar Sweetened Beverage Tax Community Advisory Board	SEPERATED
NEW THIS PERIOD (4)							
HOUSING & COMMUNITY DEV.	Leshin	Maryann	89919 - Department of Housing & Community Development	2/13/2018	TCSE	Deputy Director - urgent need to fill position with exceptional duties that cannot be accomplished with current staffing level.	COMPLIANT
HUMAN SERVICES	Breedlove	Jaqueline	75231 - Multipurpose Senior Service Program	2/24/2018	TCSE/ Annuitant	Provide training to new Case managers and complete procedural manual for future reference per funder's mandate.	COMPLIANT
PLANNING & BUILDING	Gunari	Seth	84111 - Admin: Planning, Building & Neighborhood Services	3/12/2018	ELDE	Temporary assignment to support Specialty Combination Inspectors	COMPLIANT
HUMAN SERVICES	Hicks	Kathleen	78111 - DHS Administration Unit	3/1/2018	TCSE	Filing in for Executive Assistant staff out on leave.	COMPLIANT
COMPLIANT (41)							
CITY ADMINISTRATOR	Dyckoff	Howard	02111 - Administration Unit	9/27/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website.	COMPLIANT
CITY ADMINISTRATOR	Mason	Vanessa	02111 - Administration Unit	9/27/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website.	COMPLIANT
CITY ADMINISTRATOR	Martinson	Leif	02111 - Administration Unit	9/27/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website.	COMPLIANT
CITY ADMINISTRATOR	Steinzig	Raphaelle	02111 - Communications Unit	7/31/2017	TCSE	Temporary support on Digital Front Door project to update the City's website.	COMPLIANT
CITY ADMINISTRATOR	Swanson	Luke	02111 - Communications Unit	9/25/2017	TCSE	Temporary project: Oakland Design League - to build the City's new website	COMPLIANT
CITY COUNCIL	Lopes	Joyce	00011 - Council Administration Unit	10/4/2016	TCSE/ Annuitant	Filling in for Council staff out on leave	COMPLIANT
CONTROLLER - FINANCE	Bhatnager	Amit	08211 - Accounting Administration Unit	1/8/2018	TCSE	Temporary project to develop Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Applications.	COMPLIANT
DEPT. OF TRANSPORTATION	Brown	Brytanee	35214 - Complete Streets Planning & Project	1/13/2018	ELDE	Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Grant	Surlene	35111 - Director's Office	1/29/2018	TCSE	Temporary project to develop & implement a Public Outreach Strategy for the Capital Improvement Program (CIP).	COMPLIANT
DEPT OF TRANSPORTATION	Karl	Elliot	35211 - OakDOT	10/7/2017	ELDE	Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
ECON & WORKFORCE	Hamilton	Harry	85511 - Marketing	4/22/2017	ELDE	Spec under revision for Marketing Program Coordinator series; duties not yet fully defined.	COMPLIANT
ECON & WORKFORCE	Kidder	Sarah	85511 - Cultural Arts & Marketing	6/5/2017	TCSE	Temporary project support in the Film Office.	COMPLIANT

**CIVIL SERVICE BOARD
APRIL 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	NOTES	STATUS
FINANCE	Cherkis	Helen	08211 - Accounting Administration	4/17/2017	ELDE	Temporary assignment to help implement business processes in Oracle R-12	COMPLIANT
FIRE	Fontaine	Annette	20241 - Fire Communications Unit	9/5/2017	TCSE/ Annuitant	Fire Comm Manager Exempt position under development; temp assignment pending recruitment	COMPLIANT
HUMAN SERVICES	Decuir	Roslynn	78241 - Year Round Lunch Program Unit	5/23/2016	TCSE	PT Food Program Coordinator; intermittent, pending creation of PT class; HRM staff preparing salary ordinance amendment to add part time equivalent in Feb/Mar 2018	COMPLIANT
HUMAN SERVICES	Ho	Kathy	78231 -HS Classroom & Seasonal	1/29/2018	TCSE/ Annuitant	Temp staffing to help with Instructor Staffing Crises and to meet Federal and State regulations of the Head Start Program.	COMPLIANT
HUMAN SERVICES	Martin-Bobo	Pamela	75231 - Senior Services Program	1/3/2018	ELDE	Temporary appointment while FEHA hold is in place.	COMPLIANT
HUMAN SERVICES	Montgomery	Stephanie	78111 - DHS Administration Unit	8/28/2017	ELDE	Temporary assignment to administer the Oakland ReCast program (grant)	COMPLIANT
HUMAN SERVICES	Shelton	Susan	78411 - Community Housing Services	9/11/2017	TCSE/ Annuitant	Temporary project: plan, facilitate and update Oakland Homeless Strategy	COMPLIANT
LIBRARY	Anderson	Susan	61511 - African American Museum & Library	10/21/2017	ELDE	Temporary Appointment to meet public service commitments and requirements of serving the AAMLO community pending National recruitment.	COMPLIANT
MAYOR	Corbin	Khalil	01111 - Mayor	11/20/2017	ELDE	Temporary support in Mayor's office	COMPLIANT
PLANNING & BUILDING	Lenoir	Brittany	84211 - Bureau of Planning & Zoning	6/5/2017	ELDE	Time-limited project; temp assistance with backlog of telecommunication cases	COMPLIANT
PLANNING & BUILDING	Borjon	Agustin	84229 - Zoning	2/27/2017	TCSE/ Annuitant	Time-limited project; temp assistance with backlog of permits	COMPLIANT
PLANNING & BUILDING	Wells	Laurissa	84229 - Strategic Planning	7/1/2017	ELDE	Temporary assignment on project to implement the Mayor's Housing Cabinet recommendations.	COMPLIANT
POLICE	Hill	Barbara	103310 - Communications Unit	2/2/2015	TCSE/ Annuitant	Retired Dispatcher providing intermittent emergency coverage.	COMPLIANT
POLICE	Smith	Phyliss	103310 - Communications Unit	7/20/2015	TCSE/ Annuitant	Retired Dispatcher providing intermittent emergency coverage.	COMPLIANT
POLICE	Blakely	Dene	106210 - Personnel	7/31/2017	ELDE	Spec under development for Courier classification; duties not yet fully defined.	COMPLIANT
POLICE	Gray	Steve	106610 - Background & Recruiting	6/15/2017	TCSE/ Annuitant	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Hicks	Mark	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Lighten	Ronald	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Johnson	Carmen	106610 - Background & Recruiting	1/18/2014	TCSE/ Annuitant	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Quintero	Joseph	106610 - Background & Recruiting	10/12/2013	TCSE/ Annuitant	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Gatke	James	102121 - Propety Section	9/11/2017	ELDE	Police Property Specialist Spec under revision; duties not yet fully defined.	COMPLIANT

**CIVIL SERVICE BOARD
APRIL 2018 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	NOTES	STATUS
PUBLIC WORKS	Chavez	Humberto	30541 - Equipment Services Division	12/18/2017	TCSE	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Combs	Jocelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
PUBLIC WORKS	Ferguson	David	30611 - Bureau Facilities & Environment	1/13/2018	TCSE/ Annuitant	Assistant Director - Short term management of the Bureau of Facilities and Environment.	COMPLIANT
PUBLIC WORKS	Hagerty	Kenneth	30541 - Equipment Services Administration	3/27/2017	TCSE/ Annuitant	Temporary backfill of hard-to-fill vacancy.	COMPLIANT
PUBLIC WORKS	Kuvetakis	Joseph	30541 - Equipment Services Division	12/18/2017	TCSE/ Annuitant	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Pham	Tan	30541 - Equipment Services Division	12/18/2017	TCSE	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy Equipment Shop	COMPLIANT
PUBLIC WORKS	Vargas	Erika	30112 - Human Resources	6/5/2017	TCSE	Time-limited project; temp assistance with backlog of accounting tasks	COMPLIANT
PUBLIC WORKS	Weed	Jonelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
Non-Compliant (0)							





CITY OF OAKLAND

STAFF REPORT

DATE: April 19, 2018

TO: THE HONORABLE CIVIL SERVICE BOARD

FROM: Jaime Pritchett, Principal Human Resource Analyst

THROUGH: Ian Appleyard, Director of Human Resources Management

SUBJECT: Quarterly Update Regarding Pending Classification Studies Pursuant to Rule 3.04(f) of the Personnel Manual (Civil Service Rules)

The Personnel Manual (Civil Service Rules) section 3.04 (f) “Quarterly Updates” requires that the Personnel Director provide quarterly updates regarding outstanding Classification Studies to the Board and include an explanation of the delay for all studies that have been in progress for more than one year. The Board was last provided with a report in January (for quarter end December 31, 2017). This report also provides an update on classification specifications that are currently under review.

Classification Studies

Attachment A is a report of all outstanding classification studies for the quarter ending March 31, 2018. During this reporting period, four (4) studies were completed, one (1) study was canceled, and one (1) new study was received. There are currently fifteen (15) active classification studies.

EXPLANATION OF DELAYS

Five (5) active studies have passed the one-year mark:

- City Administrator Analyst
- Contract Compliance Officer
- Administrative Assistant II (will be issued 4/2/2018)
- Librarian II
- Contract Compliance Officer, Senior

The review of the City Administrator Analyst position involves a classification that is exempt from Civil Service. Despite competing demands and resource allocation issues, Human Resources Management (HRM) has finished studying the duties assigned to the incumbent’s position and prepared a preliminary recommendation. The proposal is ready for discussion with the Confidential Management Employees Association (CMEA) but the initial meeting did not occur in January 2018 as expected. Discussion is currently underway. HRM anticipates being able to resolve the classification issue with CMEA by mid to late May 2018.

For the other four classification studies, the delays were due to competing demands and resource allocation issues as well. However, HRM is working to finalize and issue the findings before the end of April 2018. The department is striving to fulfill the plan to address the list of pending studies but recognizes that studies are still rolling overdue during this transition/training period. All Recruitment and Classification Division human resource analysts are in the process of being

CIVIL SERVICE BOARD

Subject: Quarterly Classification Study Report

Date: April 19, 2018

trained on how to conduct classification studies. By building capacity among staff, the intent is to have more trained individuals who can complete studies rather than relying on the same staff analyst every time. HRM is committed to making improvements that will ensure classification study requests are addressed as quickly as possible.

Note: The Administrative Assistant II study that was received on March 1, 2017 was completed March 9, 2018. It rolled overdue but was completed approximately one week past the one-year mark for the same reasons mentioned above.

Classification Specification Review

Attachment B is a report of outstanding requests for classification specification reviews for the quarter ending March 31, 2018, showing a total of ninety-two (92) classifications: during this reporting period there were seven (7) classification revisions or creations completed and approved by the Civil Service Board and one (1) classification specification review was canceled; there is one (1) classification being advanced by HRM to the Board for the April 19, 2018, meeting; an additional eighteen (18) are in the queue for discussion with the representative union and advancement to the Board in the near future; there are forty-nine (49) classification specification reviews assigned and under review by analysts; and there are an additional sixteen (16) for which HRM has received requests that have not yet been assigned. Classification creation and revision work will be distributed among all analysts as part of the overall efforts to increase their flexibility and our responsiveness to organizational needs.

Status	Qty
Approved by CSB or Closed During Quarter	8
Scheduled to CSB for Approval	2
Under Review for Scheduling of Meet & Confer with Representative Union	17
Assigned to Analyst for Review	49
Pending for Assignment	16
TOTAL	92

For questions regarding this report, please contact Jaime Pritchett, Principal Human Resource Analyst, at (510) 238-4735.

Attachment A – Classification Studies (Desk Audits) as of March 31, 2018

Attachment B – Classification Specifications under review as of March 31, 2018

**City of Oakland - Human Resources Management
Classification Studies**

ATTACHMENT A

	Department	Classification	Date Received	Date Complete	Days Elapsed	Pending 1+ yr?	Status
1	FINANCE	City Administrator Analyst	11/4/2016			Yes	In discussion with union about recommended outcome; expect to finalize findings in the next 4-6 weeks.
2	CAO	Contract Compliance Officer	11/7/2016			Yes	Finalizing findings; anticipated completion has been revised to April 2018.
3	OPW	Administrative Assistant II	11/28/2016			Yes	Report completed; will be issued on 4/2/2018 and will count toward the next quarter.
4	OPW	Administrative Assistant II	3/1/2017	3/9/2018	373	Yes	Completed.
5	LIBRARY	Librarian II	3/7/2017			Yes	Finalizing findings; anticipated completion is April 2018.
6	CAO	Contract Compliance Officer, Senior	3/16/2017			Yes	Finalizing findings; anticipated completion is April 2018.
7	HCD	Administrative Assistant II	3/28/2017	1/8/2018	286	No	Completed.
8	OPR	Recreation Program Director	4/7/2017			No	Assigned; in initial stages.
9	OPR	Recreation Program Director	4/7/2017			No	Assigned; in initial stages.
10	OFD	Program Analyst I	5/9/2017			No	Assigned; in initial stages.
11	OFD	Management Assistant	6/8/2017	1/12/2018	218	No	Completed.
12	HRM	Human Resource Clerk	6/19/2017	2/27/2018	253	No	Completed.
13	OPR	Recreation Leader II, PPT	8/3/2017	2/16/2018	n/a	No	Canceled; employee resigned.
14	EWD	Program Analyst I	10/10/2017			No	Pending assignment.
15	LIBRARY	Librarian, Supervising	10/25/2017			No	Pending assignment.
16	OPW	Administrative Assistant II	11/8/2017			No	Pending assignment.
17	FINANCE	Tax Auditor II	11/14/2017			No	Pending assignment.
18	HSD	Accountant II	12/21/2017			No	Pending assignment.
19	EWD	Program Analyst II	12/21/2017			No	Pending assignment.
20	FINANCE	City Administrator Analyst	3/20/2018			No	New assignment.

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

ATTACHMENT B

CLASS	DEPT	TITLE	REP	TYPE	NOTES
CLOSED THIS QUARTER (8)					
TBD	VIOLENCE	Chief of Violence Prevention	TBD	NEW SPEC	Approved at 2/15/18 CSB Meeting
EM229	POLICE COMMISSION	Executive Director, Community Police Review Agency (CPRA)	UK1	SPEC REVISION	Approved at 2/15/18 CSB Meeting
TBD	ITD	Help Desk Supervisor	TBD	NEW SPEC	Approved at 1/18/18 CSB Meeting
TBD	DOT	Manager, Parking & Mobility Services	TBD	NEW SPEC	Canceled.
TBD	EWD	Marketing Program Coordinator	TBD	NEW SPEC	Approved at 1/18/18 CSB Meeting
SC195	OPW	Parking Meter Collector Supervisor	UH1	SPEC REVISION	Approved at 3/15/18 CSB Meeting
SC206	OPW	Public Works Supervisor I	UH1	SPEC REVISION	Approved at 2/15/18 CSB Meeting
SC207	OPW	Public Works Supervisor II	UH1	SPEC REVISION	Approved at 2/15/18 CSB Meeting
SCHEDULED (2)					
SC246	ATTORNEY	Open Government Coordinator	UM2	SPEC REVISION	Scheduled for 4/19/18 CSB Meeting
AF055	FINANCE	Assistant Budget Analyst	TW1	SPEC REVISION	Scheduled for 4/19/18 CSB Meeting
PENDING MEET & CONFER (17)					
TBD	FINANCE	Budget & Management Analyst	TBD	NEW SPEC	Drafting new class spec
AP144	CPRA	Complaint Investigator III	TW1	SPEC REVISION	In progress with Local 21.
TBD	CITYWIDE	Courier	TBD	NEW SPEC	Drafting new class spec
TC143	OFD	Fire Equipment Technician	SB1	SPEC REVISION	On hold.
MA148	OFD	Fire Marshal, Assistant (Non-Sworn)	UM2	SPEC REVISION	Preparing meet and confer notice for union.
TC119	HRM	Human Resource Technician, Senior	TW1	SPEC REVISION	Drafting proposed revisions.
PS162	OPD	Police Communications Dispatcher	SC1	SPEC REVISION	Meetings will resume with Local 1021.
PS163	OPD	Police Communications Operator	SC1	SPEC REVISION	Meetings will resume with Local 1021.
NEW	OPD	Police Communications Dispatcher, Senior	TBD	NEW SPEC	Under review by Local 21.
PS170	OPD	Police Property Specialist	SC1	SPEC REVISION	Not able to meet in October 2017; future Local 1021 meeting date to be determined.
SC206	OPW	Public Works Supervisor I	UH1	SPEC REVISION	Concluded meetings with Local 21; finalizing agreed upon revisions.
SC207	OPW	Public Works Supervisor II	UH1	SPEC REVISION	Concluded meetings with Local 21; finalizing agreed upon revisions.
TR175	OPW	Sewer Maintenance Leader	SC1	SPEC REVISION	Future Local 1021 meeting date to be determined
TR176	OPW	Sewer Maintenance Worker	SC1	SPEC REVISION	Future Local 1021 meeting date to be determined
TBD	OPW	Sign Technician, Senior	TBD	NEW SPEC	Drafting new class spec
TR186	OPW	Traffic Sign Maker	SC1	SPEC REVISION	Preparing proposed spec revisions for department review
TC144	OPD	Veterinary Technician	SD1	SPEC REVISION	Met with Local 1021; finalizing agreement.

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

CLASS	DEPT	TITLE	REP	TYPE	NOTES
IN PROGRESS (49)					
TR203	OPD	Animal Care Attendant	SC1	SPEC REVISION	In the queue for meeting with Local 1021
TBD	PBD	Assistant Director of Planning & Building	TBD	NEW SPEC	Drafting new class spec
TBD	HRM	Assistant Human Resources Director	TBD	NEW SPEC	Drafting new class spec
PS180	OFD	Battalion Chief	FQ1	SPEC REVISION	Preparing proposed spec revisions for department review
AF047	FINANCE	Budget & Operations Analyst III	TW1	SPEC REVISION	Preparing proposed spec revisions for department review
PS104	OFD	Captain of Fire	FQ1	SPEC REVISION	Preparing proposed spec revisions for department review
PS107	OPD	Captain of Police	UN2	NEW SPEC	Collecting job analysis information for draft class spec
EM131	LIBRARY	Chief Curator of AAMLO	UM1	SPEC REVISION	Preparing proposed spec revisions for department review
EM122	OPD	Chief of Police	UN1	NEW SPEC	Drafting new class spec
MA109	CAO	City Administrator Analyst	U31	NEW SPEC	Preparing proposed class spec for department review
TBD	OFD	CORE Instructor, PT	TBD	NEW SPEC	Department reviewing proposed draft.
SC130	OPW	Custodial Services Supervisor I	UH1	SPEC REVISION	Finalizing proposed spec revisions with department
EM135	OPD	Deputy Chief of Police	UN2	NEW SPEC	Drafting new class spec
AP252	CITYWIDE	Development Specialist III	TW1	SPEC REVISION	Preparing proposed spec revisions for department review
EM103	FINANCE	Director of Finance	UK1	NEW SPEC	Drafting new class spec
EM264	DOT	Director of Transportation	UK1	NEW SPEC	Drafting new class spec
TBD	DOT	Director of Transportation, Assistant	TBD	NEW SPEC	Drafting new class spec
PS119	OFD	Engineer of Fire	FQ1	SPEC REVISION	Preparing proposed spec revisions for department review
PS129	OFD	Fire Fighter	FQ1	SPEC REVISION	Finalizing proposed spec revisions with department
PS184	OFD	Fire Fighter Paramedic	FQ1	SPEC REVISION	Finalizing proposed spec revisions with department
PS139	OFD	Fire Investigator	FQ1	SPEC REVISION	Preparing proposed spec revisions for department review

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

ATTACHMENT B

CLASS	DEPT	TITLE	REP	TYPE	NOTES
EM168	OFD	Fire Marshal (Sworn)	UU1	SPEC REVISION	Finalizing proposed spec revisions with department
PS142	OFD	Fire Prevention Bureau Inspector (Civilian)	SC1	SPEC REVISION	Finalizing proposed spec revisions with department
TR140	OPW	Gardener Crew Leader	SC1	SPEC REVISION	In initial discussion with department about assignment
TR141	OPW	Gardener I	SC1	SPEC REVISION	In initial discussion with department about assignment
TR142	OPW	Gardener II	SC1	SPEC REVISION	In initial discussion with department about assignment
SS129	HRM	Human Resource Clerk	TA1	SPEC REVISION	Preparing proposed spec revisions for department review
TC117	HRM	Human Resource Technician	TW1	SPEC REVISION	Preparing proposed spec revisions for department review
PS149	OFD	Lieutenant of Fire	FQ1	SPEC REVISION	Preparing proposed spec revisions for department review
PS194	OPD	Lieutenant of Police	PP1	NEW SPEC	Collecting job analysis information for draft class spec
TBD	FINANCE	Manager, Finance	TBD	NEW SPEC	Drafting new class spec
TBD	DOT	Manager, Transportation Bureau	TBD	NEW SPEC	Drafting new class spec
TR164	OPD	Parking Control Technician	SC1	SPEC REVISION	In the queue for meeting with Local 1021
TR168	OPW	Parking Meter Repair Worker	SB1	SPEC REVISION	Held one meeting with Local 1021; collecting additional information; will schedule a follow-up meeting when research has concluded.
AP282	PBD	Planning Investigator	SD1	SPEC REVISION	New assignment
PS161	OPD	Police Cadet	UG1	NEW SPEC	Draft developed; pending sup review & dept feedback
PS164	OPD	Police Communications Supervisor	UH1	SPEC REVISION	Finalizing proposed spec revisions with department
EM200	FINANCE	Purchasing Manager	UM1	NEW SPEC	Drafting new class spec
PS179	OPD	Sergeant of Police	PP1	NEW SPEC	Collecting job analysis information for draft class spec
IS119	PBD	Specialty Combination Inspector	SD1	SPEC REVISION	Preparing proposed spec revisions for department review

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

ATTACHMENT B

CLASS	DEPT	TITLE	REP	TYPE	NOTES
IS120	PBD	Specialty Combination Inspector, Senior	SD1	SPEC REVISION	Preparing proposed spec revisions for department review
TR178	OPW	Stationary Engineer	SB1	SPEC REVISION	In initial discussion with department about assignment
TR185	OPW	Traffic Painter	SB1	SPEC REVISION	Preparing proposed spec revisions for department review
TBD	DOT	Transportation Planner	TBD	NEW SPEC	Finalizing proposed draft with department
TBD	DOT	Transportation Planner, Assistant	TBD	NEW SPEC	Finalizing proposed draft with department
TR187	DOT	Transportation Planner, Senior	UM2	SPEC REVISION	Finalizing proposed spec revisions with department
TR188	OPW	Tree High Climber	SC1	SPEC REVISION	Received proposed spec revisions from department; under review prior to submission to union
AP348	EWD	Urban Economic Analyst III	TW1	SPEC REVISION	Preparing proposed spec revisions for department review
TBD	OFD	US&R Instructor, PT	TBD	NEW SPEC	Department reviewing proposed draft.
PENDING ASSIGNMENT (16)					
EM118	CITYWIDE	Assistant to the Director	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
EM127	CLERK	City Clerk, Assistant	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
MA113	CAO	Controller	UK2	DRAFT/REVISE	Pending analyst assignment
EM220	PBD	Director of Building & Planning	UK1	NEW SPEC	Pending analyst assignment
NEW	EWD	Director of Economic & Workforce Development	UK1	NEW SPEC	Draft pending CAO approval
EM154	HCDD	Director of Housing & Community Development	UK1	NEW SPEC	Draft pending CAO approval
PP121	OPW	Environmental Services Intern	TW1	NEW SPEC	Assess classification as part of cleanup and clarification of intern classifications
SS120	ATTY	Exec Asst to Asst City Attorney	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
SS121	CAO	Executive Asst to the Assistant City Administrator	U31	SPEC REVISION	Draft pending CAO approval
SS126	CAO	Executive Asst to the City Administrator	U31	SPEC REVISION	Draft pending CAO approval
EM242	CAO	Inspector General	UK1	NEW SPEC	Initially approved by CSB 4/11/13; June 2013 - new revisions under discussion
SS142	CITYWIDE	Management Intern	TA1	NEW SPEC	Pending analyst assignment
EM177	CAO	Manager, Contract & Employment Services	UM1	SPEC REVISION	UM1/UM2 follow up; update draft spec
NEW	CAO	Neighborhood Services Program Manager	TBD	NEW SPEC	Pending analyst assignment

**City of Oakland - Human Resources Management
Status of Classification Specification Reviews**

ATTACHMENT B

CLASS	DEPT	TITLE	REP	TYPE	NOTES
SS164	CITYWIDE	Planning Intern/Housing Intern	UG1	SPEC REVISION	Broaden existing class to include Housing or merge with/revise Student Trainee. Cleanup and clarification of intern classifications
AP340	ITD	Telephone Services Specialist	IE1	SPEC REVISION	Awaiting proposed spec revisions from department



DANIEL S. CONNOLLY

Deputy Port Attorney

Sender's Tel . No.: (510) 627-1342

Sender's Fax No.: (510) 444-2093

Sender's E-Mail: dconnolly@portoakland.com

March 1, 2018

VIA EMAIL AND REGULAR U.S. MAIL

TPulliam@Oakland.net

Civil Service Board
City of Oakland
150 Frank Ogawa Plaza, 2nd Floor
Oakland, CA 94612

Re: Appeal of Classification Study by Port of Oakland Employee Lakita Spencer
Hearing Date: March 15, 2018
Port of Oakland Position Statement/Exhibits

To the Honorable Members of the City of Oakland Civil Service Board:

Please consider this correspondence and attached exhibits as a position statement submitted by the Port of Oakland ("Port") in response to the appeal filed by Ms. Lakita Spencer concerning the classification study ("study" or "desk audit") conducted by the Port. A copy of Ms. Spencer's appeal is attached as Exhibit A. The Port currently employs Ms. Spencer at the Oakland International Airport ("OAK") as an Aviation Assistant Marketing and Commercial Representative; a copy of the job specifications for the Aviation Assistant Marketing and Commercial Representative Classification is attached as Exhibit B. In this instance, Ms. Spencer maintains that she is performing the duties of a higher classification and that the Port should upgrade her to a higher classification, Aviation Associate Marketing and Commercial Representative.

The Port retained Koff & Associates ("Koff") to perform the study, and Georg S. Krammer, Koff's Chief Executive Officer, reviewed and studied Ms. Spencer's duties to determine whether or not the preponderance of Ms. Spencer's work fell within her classification, Aviation Assistant Marketing and Commercial Representative classification; a copy of the study is attached as Exhibit C. The study concluded that "it does not appear that Ms. Spencer's position is a good fit for any of the other levels within the Aviation Marketing and Commercial Representative class series," and that there should be "no change to Ms. Spencer's classification of Aviation Assistant Marketing and Commercial Representative."

Based on the results of the study, the Port respectfully requests the Civil Service Board to deny Ms. Spencer's appeal.

I. APPLICABLE PORT PERSONNEL RULES

The Port's Personnel Rules track the Personnel Rules for the City of Oakland/Civil Service Board, and Port Personnel Rule 3.04 (Administration and Maintenance of the Classification Plan), subsection (d) addresses classification studies and provides as follows:

(d) Classification Studies: The Executive Director or his/her designee and/or the Personnel Director may initiate and conduct classification studies of any Port positions in the competitive civil service when he/she deems such study necessary, and shall recommend a change in classification where the facts warrant such action.

An employee who contends that he/she is working outside of her/his classification or who contends that her/his position has been improperly classified may submit to the Executive Director or his/her designee a request for a classification study. The Executive Director or his/her designee shall review such request and take further action as he/she deems appropriate, subject to appeal to the Civil Service Board as provided in section 3.04(e) of these Rules.

Subsection (e) of Port Personnel Rule 3.04 concerns appeals to the Civil Service Board regarding classification studies and provides as follows:

(e) Appeal to Civil Service Board regarding Changes in Classification:

In the event the Executive Director or his/her designee has made a decision regarding a change to an employee's classification or regarding an employee's request for review of her/his classification, and the affected employee does not agree with this decision, the employee or affected union shall have an opportunity to be heard by the Civil Service Board before the Executive Director's decision becomes effective. The employee shall file an appeal with the Secretary to the Civil Service Board within fifteen (15) working days of notice of the Executive Director's decision. A letter sent to the affected employee's address of record via regular and certified mail, or hand delivered to the affected employee, shall constitute notification. At the hearing, the appointing authority, employee and/or affected union shall have an opportunity to present their positions, either orally or in writing. The Executive Director or her/his designee shall also have an opportunity to be heard by the Civil Service Board. The Civil Service Board shall issue a final and binding decision regarding the classification issue in dispute.

A copy of Port Personnel Rule 3.04 is attached as Exhibit D.

II. The Classification Study

The study performed by Koff reviewed Ms. Spencer's duties as an Aviation Assistant Marketing and Commercial Representative to determine whether such duties were consistent with the classification's job specifications. In conjunction with such review, Ms. Spencer completed and submitted a Position Description Questionnaire ("PDQ"), and both John Albrecht, the Aviation Marketing Manager, and Brian Kidd, the Aviation Marketing Supervisor, reviewed Ms. Spencer's PDQ responses and provided comments. A copy of Ms. Spencer's PDQ responses, along with the comments submitted by Mr. Albrecht and Mr. Kidd, are attached as Exhibit E. Both Mr. Albrecht and Mr. Kidd is in Ms. Spencer's chain of command.

Ms. Spencer thereafter submitted a "Task Chart" with the heading, "Lakita Spencer- Priorities through December 2017" for consideration in the study; a copy of the chart is attached as Exhibit F.

The Study relied on Ms. Spencer's PDQ responses, Mr. Albrecht's and Mr. Kidd's comments, interviews with Ms. Spencer, Mr. Albrecht and Mr. Kidd as well as interviews with incumbents (Ms. Holloway and Ms. Heavers) in a similar but higher classification, the Aviation Associate Marketing and Commercial Representative classification. The study also reviewed the job specifications for the Aviation Senior Marketing and Commercial Representative Classification, the Aviation Associate Marketing and Commercial Representative Classification, and the Aviation Assistant Marketing and Commercial Representative Classification.

III. The Study's Analysis and Conclusion

The Study noted that Ms. Spencer was initially hired by the Port to coordinate the Visitor Information Program and that over the past nine years, Ms. Spencer's position responsibilities have expanded in that she now coordinates the Customer Satisfaction Survey Program and the Performance Art Program. In reviewing the job specifications for Ms. Spencer's current classification, Aviation Assistant Senior Marketing and Commercial Representative, the Study also noted that of the eleven typical job functions, ten related to Ms. Spencer's current work assignments. (See, Exhibit C, pages 4-5) The Study concluded that Ms. Spencer clearly performs the assignments of the Aviation Assistant Marketing and Commercial Representative Classification. (See, Exhibit C, page 5)

The Study also compared Ms. Spencer's job specifications with those for the Aviation Associate Marketing and Commercial Representative and concluded that "Ms. Spencer's responsibilities are not captured in this classification." (See, Exhibit C, page 6-7) The Study further noted that while Ms. Spencer "does assist with tours to OAK, some of the special events, does the procurement and accounting support piece behind what is needed for special events, [she] otherwise does not have assignments that relate to the Associate classification." (See, Exhibit C, page 6) The study noted, for example, that the incumbents (Ms. Holloway and Ms. Heavers) in the Associate classification manage budgets (Ms. Holloway, an Associate Marketing and Commercial Representative, managed a budget of \$2 million), negotiate contracts, and manage key strategic relationships between the OAK and airline partners, the Visitor's Bureau, the Economic Development Institute, and advertising agencies. (See, Exhibit C, page 6) The Study concluded that "the breadth and variety of work, and the strategic aspect of the work that has airport-wide impact, in addition to the financial responsibilities," distinguish the assignments of the incumbents in the Associate classification from those of Ms. Spencer. (See, Exhibit C, page 7)

Importantly, as noted by the Study, Ms. Spencer does not manage employees but oversees the volunteers of the volunteer program; she is not in charge of strategic goals; she does not set work priorities which are set at the department level; and, she does not set the program budget which is determined by the department manager. (See, Exhibit C, page 9)

The Study concluded that “it does not appear that Ms. Spencer’s position is a good fit for any of the other levels within the Aviation Marketing and Commercial Representative class series” and that the “Assistant level is specifically designed around Ms. Spencer’s assignments and still is the best fit for her position.” Importantly, the Study stated that “while the Customer Survey and Performance Arts Assignments are not specifically called out in the class description, they are not considered two completely new and separate programs requiring additional skill sets but rather are an extension of the Volunteer Program.” (See Exhibit C; pages 9-10) Most importantly, the Study concluded that “in comparison to other levels within the Aviation Marketing and Commercial Representative class series, Ms. Spencer’s position is not a fit for the Associate or Senior level....” (See Exhibit C, page 10)

The Study recommended “no change to Ms. Spencer’s classification of Aviation Assistant Marketing and Commercial Representative.” (See Exhibit C, page 10)

IV. Conclusion

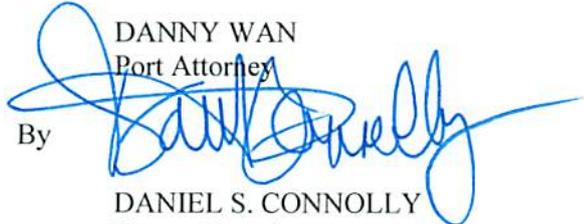
Based on the analysis and findings of the Study, there is not a preponderance of evidence to establish that the work performed by Ms. Spencer falls within the Associate (or Senior) Aviation Marketing and Commercial Representative Classifications. The Study confirmed that the Aviation Assistant Marketing and Commercial Representative Classification is “designed around her assignments and is the best fit for her position.” (See Exhibit C, page 9)

Accordingly, based on this correspondence and the Study and its Exhibits, the Port of Oakland respectfully requests that the Civil Service Board deny Ms. Spencer’s appeal in this matter.

Very truly yours,

DANNY WAN
Port Attorney

By



DANIEL S. CONNOLLY
Deputy Port Attorney

Attachments: Exhibits A through F

EXHIBIT A

Daniel Connolly

From: Appleyard, Ian <IAppleyard@oaklandnet.com>
Sent: Wednesday, January 10, 2018 10:29 AM
To: Christopher Boucher; Richardson, Ryan
Cc: Daniel Connolly; Michael Mitchell; Pulliam, Tabitha
Subject: RE: Hearing Request: Civil Service Board, Lakita Spencer

Christopher and Ryan,

Thanks for keeping this on track. I have copied Tabitha Pulliam, she is coordinating the Board's activities and will make sure Mr. Connolly is in the loop.

-Ian

Ian Appleyard

Human Resources Director
Human Resources Management Department



150 Frank H. Ogawa Plaza, 3rd floor
Oakland, CA 94612
Phone: (510) 238-6450
Fax: (510) 238-2976

From: Christopher Boucher [mailto:cboucher@portoakland.com]
Sent: Wednesday, January 10, 2018 9:37 AM
To: Richardson, Ryan <RRichardson@oaklandcityattorney.org>; Appleyard, Ian <IAppleyard@oaklandnet.com>
Cc: Daniel Connolly <dconnolly@portoakland.com>; Michael Mitchell <mitchell@portoakland.com>
Subject: RE: Hearing Request: Civil Service Board, Lakita Spencer

Dear Mr. Richardson:

Thank you for your email and outreach. The contact at the Port Attorney's Office is Dan Connolly, Deputy Port Attorney IV, and his phone number is (510) 627-1342. Dan is also copied on this email. We appreciate your kind assistance on this matter in advance.

Respectfully,

Christopher Boucher, Director of Human Resources
Port of Oakland
530 Water Street, Oakland, CA 94607
Phone: (510) 627-1202 | Fax: (510) 835-3277
Email: cboucher@portoakland.com

From: Richardson, Ryan [mailto:RRichardson@oaklandcityattorney.org]
Sent: Monday, January 08, 2018 12:41 PM
To: Appleyard, Ian <IAppleyard@oaklandnet.com>; Christopher Boucher <cboucher@portoakland.com>
Subject: RE: Hearing Request: Civil Service Board, Lakita Spencer

Ian & Chris:

This is a new one on me. Is it customary for the City Attorney's Office to handle an Class Study appeal from a Port employee? Is there someone in the Port attorney's office I should consult with?

Ryan Richardson
[510.238.6523](tel:510.238.6523) | r-richardson@oaklandcityattorney.org

From: Pulliam, Tabitha [<mailto:TPulliam@oaklandnet.com>]
Sent: Monday, January 08, 2018 11:19 AM
To: Richardson, Ryan <RRichardson@oaklandcityattorney.org>
Cc: Appleyard, Ian <IAppleyard@oaklandnet.com>; Christopher Boucher <cboucher@portoakland.com>; Pritchett, Jaime <JPritchett@oaklandnet.com>; Meyers, Michelle <MMeyers@oaklandcityattorney.org>
Subject: Re: Hearing Request: Civil Service Board, Lakita Spencer

Hello Mr. Ryan,

I am following up with you regarding the Classification Study appeal of Ms. Lakita Spencer. When you have time, can you please let me know who has been assigned this case so that I can reach out to the person regarding scheduling the appeal on this month's Civil Service Board agenda?

Thank you so much, and Happy Monday!

Tabitha

From: Pulliam, Tabitha
Sent: Monday, November 27, 2017 12:10 PM
To: 'Richardson, Ryan' <RRichardson@oaklandcityattorney.org>
Subject: RE: Hearing Request: Civil Service Board

Absolutely, Mr. Ryan. Please see the attached, and let me know if you need me to do anything for you.

Tabitha

From: Richardson, Ryan [<mailto:RRichardson@oaklandcityattorney.org>]
Sent: Monday, November 27, 2017 11:53 AM
To: Pulliam, Tabitha <TPulliam@oaklandnet.com>
Subject: RE: Hearing Request: Civil Service Board

Hi, Tabitha.

I'm not familiar with this appeal. As far as I can tell, she is a Port employee appealing the results of a classification study. Will you please send me whatever you have, including the actual appeal letter? Thanks.

Ryan Richardson
[510.238.6523](tel:510.238.6523) | r-richardson@oaklandcityattorney.org

From: Pulliam, Tabitha [<mailto:TPulliam@oaklandnet.com>]
Sent: Monday, November 27, 2017 11:28 AM
To: Lakita Spencer <lakitaspencer@gmail.com>
Subject: RE: Hearing Request: Civil Service Board

Hello Lakita,

Thank you so much for your response. I definitely have a clearer understanding of the appeal you'd like to be heard before the Civil Service Board. You are also correct in that the Civil Service Board Manual does provide that an employee may present her appeal before the Board, so I will note that you opt to represent yourself. I will move forward with processing your request and either I or another Staff member to the Board will reach out to you with next steps.

Thank you, again, for your timely request and response. Please feel free to reach out to me if you have any further questions and/or concerns.

My best regards,

Tabitha

From: Lakita Spencer [<mailto:lakitaspencer@gmail.com>]
Sent: Monday, November 27, 2017 10:25 AM
To: Pulliam, Tabitha <TPulliam@oaklandnet.com>
Subject: Re: Hearing Request: Civil Service Board

Hello Tabitha,

I received the copy of my classification report from my attorney on November 17th after several requests to my employer. Due to the holidays, I have not had an opportunity to speak with my attorney about the Civil Service Process and timelines but based on the personnel rules it states the employee or union can file. I did not list my attorney because I have a complex case and was not sure if I should include the other items that fall within items that can be grieved through the Civil Service Board under section 3.04(e) and 5.07 .

In short, I filed a grievance with my union against the Port for continued retaliation and disparate treatment that has been ongoing for almost 10 tens years, although civil service allows for a reassignment, my employer offered to transfer me to another department(reassignment) provided I signed a release of claims and signed away my civil rights. My union who works in collusion with my employer advised me to sign a settlement agreement for transfer(reassignment) provisioned in the Civil Service rules. Based on having no internal support, I retained legal counsel to assist me with getting reasonable accommodations after returning from brain surgery and the transfer my employer initially offered to settle my grievance.

The classification study was done as apart of this grievance in an effort to address the increased responsibility and potential misclassification of my position, continued denied growth opportunities and etc. the information reported in my classification study is inaccurate and does not fairly represent my responsibilities and I would like an opportunity to have my case evaluated by civil service board since they would be a neutral and unbiased party.

I would prefer not to incur additional attorney's fees, if this is an item I can represent myself but to ensure I receive a fair review I will do what is necessary.

Regards,

Lakita Spencer

On Mon, Nov 20, 2017 at 9:38 AM, Pulliam, Tabitha <TPulliam@oaklandnet.com> wrote:

Good Monday Morning Lakita,

Thank you for submitting your request for a hearing before the Civil Service Board regarding rule 3.04 (e). I do have a couple of follow up questions for you. Were you notified of the results of the classification study on Friday, November 17th? Also, I noticed that you did not designate a representative for yourself in your request. Will you be seeking union representation, an outside Attorney or some other option? I have attached an official CSB hearing request form for you to fill out and submit should you choose to update your information utilizing the official CSB form. If not, could you please declare (email the document to me) in writing who your representative will be, including full contact information for the person?

Thank you in advance for your response,

Tabitha

Tabitha Pulliam

Human Resources Management, Recruitment & Classification

150 Frank Ogawa Plaza, 2nd Floor

Oakland, CA 94612

☎ [510-238-6619](tel:510-238-6619)

✉ TPulliam@Oaklandnet.com

🌐 <http://www2.oaklandnet.com/>



CITY OF OAKLAND

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From: Pulliam, Tabitha On Behalf Of Civil Service
Sent: Friday, November 17, 2017 4:52 PM
To: Pulliam, Tabitha <TPulliam@oaklandnet.com>
Subject: FW: Hearing Request: Civil Service Board

From: Lakita Spencer [<mailto:lakitaspencer@gmail.com>]
Sent: Friday, November 17, 2017 2:11 PM
To: Civil Service <civilservice@oaklandnet.com>
Subject: Hearing Request: Civil Service Board

Dear Mr. Appleyard,

As provisioned in the Personnel Manual, Civil Service Board rules for the City of Oakland, adopted April 20, 2017 I would like to submit the attached hearing request cover letter.

Regards,

Lakita Spencer

This is a confidential attorney-client communication. This email contains confidential attorney-client privileged information and is for the sole use of the intended recipient(s). Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply e-mail and destroy all copies of the original message and any attachments. [v1.3]

HEARING REQUEST: CIVIL SERVICE BOARD

November 17, 2017

Ian Appleyard
Director of Human Resource Management
Lionel J. Wilson Building
150 Frank Ogawa Plaza, 2nd Floor
Oakland, CA 94612

RE: Classification Study Appeal Request

Name: Lakita Spencer
Title: Aviation Assistant Marketing & Commercial Representative
Mailing Address: 1779 Mill Springs CMN#109 Livermore, CA 94550
Telephone: (510) 394-4740
Email: lakitaspencer@gmail.com
Business Email: ispencer@portoakland.com

Hearing Availability Dates:

- December 14, 2017
- December 21, 2017
- January 11, 2017

Estimated Hours required for Presentation: 1 hour

Basis for Appeal: Pursuant to Personnel Rule 3.04 (e) I am requesting an appeal of the completed Classification Study.

Date of Alleged Rules Violation: November 17, 2017
City Department: City of Oakland, Port of Oakland

EXHIBIT B

AVIATION ASSISTANT MARKETING & COMMERCIAL REPRESENTATIVE

A. CLASS DEFINITION

Under general direction, the incumbent is responsible for oversight and coordination of various aspects of the volunteer Visitor Information Program (VIP) and the Airport and tenant employee customer service training program (Ambassador Program) at Oakland International Airport.

Distinguishing Characteristics

This is the entry level of the Aviation Commercial Rep series. The work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility. Initially, incumbents work under close supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned. It is distinguished from the next higher level of Aviation Associate Marketing & Commercial Representative in that the latter performs duties in the promotions and marketing profession and may supervise support staff.

B. TYPICAL TASKS/DUTIES

1. Schedules and assigns a staff of volunteers to work at 5 information booths at both airport terminals for 4-hour shifts, 7 days per week; keeps track of their time.
2. Recruits for volunteers at local area Senior Citizens Centers; gives presentations on volunteer opportunities at the airport; also places free ad in local area newspapers.
3. Acts as liaison between Aviation Marketing and Landside Operations to gather ground transportation information listings to update the Airport's website and Travel Planner publication.
4. Trains volunteers on their duties and provides ongoing computer training; provides job orientation and assisting volunteers on completing and passing FAA background checks.
5. Processes stipend reimbursements to volunteer workers for meal/refreshment, transportation, and blazer; prepares reports to reflect any and all monies going out; prepares requests for checks to Finance.
6. Monitor individual volunteer performance; follows up on any comments, suggestions, and complaints; gives praise for good work; organizes and plans recognition events for volunteers.
7. Maintains an information book containing information about the Airport and resources available, such as ground transportation, for use by the volunteers; tallies questions asked at the Visitor Information booths by the traveling public to be used in updating the information book; passes complaints made by travelers to the appropriate departments for response or correction of problems.
8. Maintains database of inquiries and complaints from the public for use in producing statistical reports; maintains a database of Airport resources, and a database to track compensation of the volunteers.
9. Maintains and updates IFLYOAK ground transportation hotline. Schedules volunteer(s) to staff this phone service.
10. Fundraises and solicits gifts and in-kind donations for volunteers from community businesses and others.
11. Performs related duties as assigned.

C. KNOWLEDGE, SKILLS AND ABILITIES

To successfully perform the typical tasks and duties of the position, the knowledge, skills and/or abilities listed below are required.

Knowledge of:

- Ground transportation and other resources available to the traveling public.
- Airport Facilities and Landside Operations departments.
- Port policies and procedures regarding background checks.
- Travel and/or airline industry.

Ability to:

- Organize, schedule, train and assign work to a large volunteer workforce.
- Interact effectively with volunteers, tenant employees, contractors, and the general public.
- Operate a personal computer using spreadsheet, database and word processing software.
- Communicate both orally and in writing to effectively produce correspondence and reports and to speak to groups of people.
- Exercise sound independent judgment within general policy guidelines.
- Establish and maintain effective working relationships with those contacted in the performance of duties and to work as a team.
- Work under deadlines and coordinate several concurrent assignments.
- Work with minimum supervision.

D. PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform this job.

While performing the duties pertaining to this position, the incumbent is regularly required to make use of close vision to read reports, summaries, digests, and other documents. The incumbent must have eye, hand and foot coordination to operate a vehicle in conformance with Port policies and the State Vehicle Code.

E. WORK ENVIRONMENT

The work environment described here is representative of those an employee encounters while performing this job.

The incumbent typically works indoors in an air conditioned office, with a mixture of natural, incandescent and fluorescent light. Typical noise levels are muted by acoustic ceilings, carpet and sound-deadening wall panels.

F. EDUCATION AND EXPERIENCE

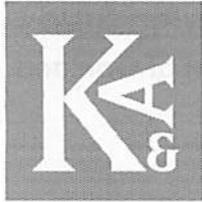
This position requires a combination of education and experience reflecting possession of the required knowledge, skills, and abilities. A typical combination would include graduation from an accredited college or university with an Associate of Arts degree or equivalent plus one year of work experience in a customer service setting.

G. OTHER CHARACTERISTICS

1. Must possess a valid California Class C driver license at the time and for the duration of appointment.
2. This Airport specific classification requires each incumbent to complete and pass a Transportation Security Administration/Federal Aviation Administration (TSA/FAA) 10-year employment history verification, which will include fingerprinting and a Criminal History Records Check (CHRC) prior to being considered for this position. This status must be maintained for the duration of employment at the airport.

CLASS CODE:	10627
STANDARD HOURS-DAY/WEEK:	7.5/day – 37.5/week
CS STATUS:	Exempt by Charter
FLSA:	Exempt
Classification Created: (Port Ordinance)	February 14, 1994
Position Retitled from Aviation Commercial Rep. II	May 2003
Revised	May 30, 2006

EXHIBIT C



Submittal Date: August 10, 2017

DRAFT FINAL CLASSIFICATION STUDY REPORT
AVIATION ASSISTANT MARKETING &
COMMERCIAL REPRESENTATIVE
Port of Oakland

Submitted By:
Koff & Associates

GEORG S. KRAMMER
CHIEF EXECUTIVE OFFICER

2835 7th Street
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OVERVIEW

In June 2017, the Port of Oakland (“Port”) retained Koff & Associates (“K&A”) to conduct a classification review of an Aviation Assistant Marketing and Commercial Representative position.

CLASSIFICATION STUDY GOALS

The goals and objectives of the classification study were to:

- Obtain detailed information regarding the studied position through a variety of techniques, including a written Position Description Questionnaire (PDQ) form describing duties, required knowledge, skills, and abilities, and other aspects of the body of work, and interviews with the incumbent, other Aviation Marketing and Commercial Representatives, and her supervisors;
- Analyze the current Port classification specifications for Aviation Assistant Marketing and Commercial Representative, Aviation Associate Marketing and Commercial Representative, and Aviation Senior Marketing and Commercial Representative;
- Provide a recommendation that recognizes the scope and level of responsibility of the studied position; and
- Provide sufficient documentation to allow the Port to integrate the studied position with the Port’s overall classification plan and operational practices.

STUDY PROCESS

The classification study procedures were as follows:

- A conference call was held with the Port’s Human Resources Supervisor to clarify study scope, objectives, processes, and deliverables.
- The incumbent completed K&A’s Position Description Questionnaire (PDQ) which was also reviewed by her supervisor and manager for feedback and concurrence.
- Consultant staff reviewed the PDQ form and interviews were conducted with the incumbent and her supervisors, as well as incumbents in similar classifications:
 - Lakita Spencer, Aviation Assistant Marketing and Commercial Representative.
 - Brian Kidd, Aviation Supervising Marketing and Commercial Representative
 - John Albrecht, Aviation Marketing Manager
 - Joanne Holloway, Aviation Associate Marketing and Commercial Representative
 - Crystal Heavers, Aviation Associate Marketing and Commercial Representative
- Following the analysis of the data collected, classification recommendations were developed for Human Resources, management, union, and employee review.



CLASSIFICATION ANALYSIS AND RECOMMENDATION

Per Ms. Spencer's PDQ and interview, the purpose of her position of Aviation Assistant Marketing and Commercial Representative is to oversee the Visitor Information Program (VIP) and the 70+ volunteers who staff the two visitor information centers/booths in the Oakland International Airport (although it is our understanding that the number of volunteers has decreased to approximately 53). In addition, Ms. Spencer coordinates the Performance Arts performers and the Customer Satisfaction Survey team, who are a part of the customer relations program. She ensures that passengers and tenants receive service that represents OAK's customer service values. Ms. Spencer performs the following duties:

1. **Visitor Information Program:** Oversee 70+ volunteers, ensure program compliance with the Port Strategic goals, oversee daily volunteer activities, evaluate performance, reward strong performance and address performance issues. Ms. Spencer inherited this program and has been involved in updating processes and policies, as well as revamp the scheduling of volunteers, which is now computerized and volunteers can schedule their own time. Mr. Kidd and Ms. Spencer work in tandem regarding hiring and terminating volunteers based on Ms. Spencer's recommendations.
2. Manage online volunteer shift assignment scheduling, timesheets, personnel updates and volunteer announcements. (Per supervisor's comments, Ms. Spencer's role is not to manage any functions but to coordinate.)
3. Manage Volunteer Program Benefits: Volunteer Stipend Reimbursements and Non-Shift Parking Requests.
4. Recruit, screen and train new volunteers: advertise, online recruitment, bi-lingual & ASL recruitment.
5. Design Visitor Information/Program Guide/ Signage Updates.
6. Coordinate Convention Visitor Bureau (CVB) deliveries, stock and monitor availability of local convention & visitor bureau travel guides and around transportation information.
7. Maintain and update airport resources, ground transportation and hospitality program guide for volunteer team.
8. Plan and execute Quarterly Staff Meetings for volunteer team.
9. Assist volunteers with completing and passing FM background checks and Computer Based Training (CBT Requirements).
10. Develop and provide ongoing computer, customer service and ADA trainings.
11. Oversee Information Booth Stocking.
12. Explore options around Integrated Technology Options-Airport Kiosks, Service Robots. (Per supervisor's comments, this has not occurred yet.)
13. Plan recognition and volunteer excursion events.
14. Assist with Aviation Marketing special events.
15. **Customer Satisfaction Experience Survey:** Execute annual plan for volunteer interviewers (the plan was originally put together by Mr. Kidd and he directs Ms. Spencer to execute).
16. Manage In-Terminal Survey processes and policies. (Per supervisor's comments, policies for activities are set by the department supervisor. Again, Ms. Spencer does not manage this process but coordinates and executes as directed by the supervisor.)
17. Train and oversee Customer Satisfaction surveyor team (the team consists of volunteers from the Volunteer Programs, i.e., volunteers get to choose whether they want to work at an information booth or take surveys, they are trained in both).
18. Plan and conduct briefings with survey team to ensure we meet quarterly quotas.



19. **OAK's Performance Arts Program:** Coordinate overall program (the program was originally developed and managed by Joanne Holloway who worked on the first set of policies with the Port's legal department to ensure that the program met regulations); provide staff oversight and recruitment, auditions, scheduling. (Per Mr. Kidd's feedback, performers are selected by both him and Ms. Spencer.)
20. Maintain performance arts signage and in-terminal welcome banners; develop and implement procedures for related terminal signage and notifications, including featuring schedule of performances on social media websites and employee communications.
21. Process parking requests and compliance for OAK performance arts program.
22. Secure OAK performance arts program sponsorship for recognition event give-aways, bring performers post-security, set-up branded stages.
23. Maintain creative brand for OAK performance arts program: signage, outreach materials etc. (Per supervisor's comments, this has not occurred yet.)
24. Develop marketing partnership opportunities with local performing arts programs and entertainment venues to diversify performance types. (Per supervisor's comments, this has not occurred yet.)
25. Customer Relations: Execute passenger retention projects: determine incentives and proposed amenities. (Per supervisor's comments, this has not occurred yet.)
26. Implement customer service values: re-engage Port Aviation employees, OAK tenants, volunteers and partners. (Per supervisor's comments, this has not occurred yet.)
27. Oracle: Process monthly contract payments for department.
28. Oracle: Process Payroll and maintenance work orders as needed.
29. Manage vendor verifications and compliance, including payment coordination, reconciliation, subscriptions etc.

Ms. Spencer's work assignments have not changed significantly over the recent period of time. Over the course of her employment, she received additional work responsibilities from the Aviation Associate position when staff member Rosemary Barnes resigned around 2012. At the time Ms. Barnes resigned, she was primarily responsible for implementing customer service initiatives and managed the customer relations program. Ms. Barnes' work plan included implementation and management of engaging Airport staff, tenants and partners around the airport's customer service excellence program. The program coordination included updating the airport's customer service wall and the Performance Arts program. Since Ms. Barnes left the organization, Ms. Spencer has been responsible for designing and maintaining the content updates on the customer service wall and coordinating the performance arts program. Prior to Ms. Barnes, these duties were carried out by Associate level staff Joanne Holloway. Ms. Holloway managed the Performance Arts program from its inception. Ms. Holloway was also responsible for coordinating in-terminal passenger surveys, which were administered by ASQ, an outside firm. When Ms. Spencer was assigned the Customer Satisfaction Survey program, she was tasked with recruiting an internal team using similar approaches she uses for the Visitor Information Program.

Ms. Spencer has worked collaboratively with both Associate Representatives Joanne Holloway and Rosemary Barnes to design presentations, suggest practices and implementation guidelines for improving the terminal experience and engaging OAK customers.

Initially, Ms. Spencer was hired solely to coordinate the Visitor Information program. Over the past nine years, her position responsibilities have expanded in that she now also coordinates the Customer Satisfaction Survey program and the Performance Art program.



Comparative Analysis

In order to determine whether, or not, the preponderance of Ms. Spencer’s work falls within the Aviation Assistant Marketing and Commercial Representative classification, we reviewed the current Port classification description.

The following outlines the responsibilities and duties stated in the Aviation Assistant Marketing and Commercial Representative classification:

Per the Port’s classification description, the Aviation Assistant Marketing and Commercial Representative is responsible for oversight and coordination of various aspects of the volunteer Visitor Information Program (VIP) and the Airport and tenant employee customer service training program (Ambassador Program) at Oakland International Airport. This classification is considered the entry level of the Aviation Marketing and Commercial Representative series. The work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility. Initially, incumbents work under close supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned. It is distinguished from the next higher level of Aviation Associate Marketing & Commercial Representative in that the latter performs duties in the promotions and marketing profession and may supervise support staff.

The Aviation Assistant Marketing and Commercial Representative’s typical job functions include (we bolded the statements that relate to Ms. Spencer’s assignments):

1. **Schedules and assigns a staff of volunteers to work at 5 information booths at both airport terminals for 4-hour shifts, 7 days per week; keeps track of their time.**
2. **Recruits for volunteers at local area Senior Citizens Centers; gives presentations on volunteer opportunities at the airport; also places free ad in local area newspapers.**
3. **Acts as liaison between Aviation Marketing and Landside Operations to gather ground transportation information listings to update the Airport’s website and Travel Planner publication.**
4. **Trains volunteers on their duties and provides ongoing computer training; provides job orientation and assists volunteers on completing and passing FAA background checks.**
5. **Processes stipend reimbursements to volunteer workers for meal/refreshment, transportation, and blazer; prepares reports to reflect any and all monies going out; prepares requests for checks to Finance.**
6. **Monitors individual volunteer performance; follows up on any comments, suggestions, and complaints; gives praise for good work; organizes and plans recognition events for volunteers.**
7. **Maintains an information book containing information about the Airport and resources available, such as ground transportation, for use by the volunteers; tallies questions asked at the Visitor Information booths by the traveling public to be used in updating the information book; passes complaints made by travelers to the appropriate departments for response or correction of problems.**
8. **Maintains database of inquiries and complaints from the public for use in producing statistical reports; maintains a database of Airport resources, and a database to track compensation of the volunteers.**
9. **Maintains and updates IFLYOAK ground transportation hotline. Schedules volunteer(s) to staff this phone service.**



10. Fundraises and solicits gifts and in-kind donations for volunteers from community businesses and others.

11. Performs related duties as assigned.

Ms. Spencer clearly performs the assignments of the Aviation Assistant Marketing and Commercial Representative classification. Ms. Spencer requested a reclassification to a different classification because she feels that the evolvement of her duties over nine years have exceeded her current classification. For example, the Customer Satisfaction Survey program and the Performance Art program are not specifically referenced in the current classification. However, per feedback from her supervisor and manager, the Customer Satisfaction Survey program is not really a separate program but was an idea by Mr. Kidd to expand the use of the airport’s volunteers. Due to smartphones, many travelers look up information on their devices and no longer take advantage of the airport’s information booths. In fact, per the job description, there may have been as many as five information booths; currently, there are two. Therefore, the need for volunteers staffing those booths has declined. Mr. Kidd’s idea of using volunteers to conduct surveys added an additional level of utilization of the volunteers. Mr. Kidd himself developed the program, created the software, purchased the iPads to take the surveys, and tabulates the results. Ms. Spencer coordinates the staffing and training aspects.

Aviation Associate Marketing and Commercial Representative

In order to understand the bigger picture of Ms. Spencer’s department, how and what work is assigned to other positions, and at which level of classification the work is performed, we conducted a comparative analysis by studying two other positions in the Marketing Department: those of Joanna Holloway and Crystal Heavers, who both are Aviation Associate Marketing and Commercial Representatives.

Initially, we reviewed the classification description of this classification in comparison to Ms. Spencer’s:

The Aviation Associate Marketing and Commercial Representative implements programs that promote and market the Oakland International Airport, assists in the development of market analysis and performs related work as assigned. This is a journey-level classification that performs a limited range of duties in the promotions and marketing profession and may functionally and/or technically supervise support staff. It is distinguished from the Aviation Senior Marketing & Communications Representative in that the latter performs more difficult tasks. It is distinguished from the Aviation Assistant Marketing & Communications Representative in that the latter requires no prior professional experience and works under immediate supervision.

The Aviation Associate Marketing and Commercial Representative’s typical job functions include (again, we bolded the statements that relate to Ms. Spencer’s assignments):

1. **Implements marketing and promotional strategies to develop and sustain support for airport projects and funding.**
2. **Maintains locally based airline and travel industry and corporate travel contacts to develop a support network for airport business activities and programs, including cooperative efforts with those contacts to support new service.**
3. **Provides and presents general information related to airport facilities and features to enhance their visibility and usage; organizes tours of Oakland International Airport.**



4. Performs research and gathers industry data to target existing and to identify new markets for purposes of directing promotional efforts.
5. Prepares, edits and produces **reports**, brochures, articles and other **visual promotional presentations**.
6. Leads department event planning efforts.
7. Performs related duties as required.

Ms. Spencer's responsibilities are not captured in this classification. She does assist with tours to OAK, some of the special events, does the procurement and accounting support piece behind what is needed for special events, but otherwise does not have assignments that relate to the Associate classification.

In addition, the variety and breadth of responsibilities assigned to Ms. Holloway and Ms. Heavers is greater than that of Ms. Spencer's. Their roles are also more strategic and have greater impact on the strategic operations on an airport-wide basis. For example, Ms. Heavers is in charge of key strategic relationships between the airport and the community, Visitor's Bureau, Economic Development Institute, airline partners, etc. Ms. Heavers is also revenue generating. Ms. Holloway also has financial responsibilities in that she oversees the advertising program with a budget of \$2 million, including doing frontline negotiations for contracts, working with the Port's legal department, advertising agencies, laying out the creative ad strategies, etc. Ms. Holloway also runs the consumer affairs division. Both incumbents also function more autonomously and independently when given a strategic assignment and seeing it all the way through from inception to implementation, which is something not typically assigned to Ms. Spencer's position. Ms. Heavers establishes relationships between airport stakeholders, and potential partners, and then negotiates contracts. Ms. Holloway negotiates contracts around placing ads and decides when and where ads are placed.

Additional detail regarding Ms. Holloway's assignments:

1. Manage all professional service contracts, anything with creative or ad efforts.
2. Act as media planner and buyer for all ad efforts.
3. Manage contract with two creative firms that create ads and manage and design videos for ad placements; e.g., contract with KQED, supporting Check Please Bay Area and Broadcast News; video shows on programs, and the messages are heard on the news.
4. Cal Athletics: advertise with them in stadiums, on t-shirts, etc.
5. Manage calls from publications that want OAK to advertise with them and review their media kits and make a recommendation to supervisor.
6. Intersection Media: they place ads for OAK in BART stations, cable cars, etc; work with Intersection, what are needs, specs for any given ad, then take to creative team and they will design ad, they submit 3 ads, get them approved, then back to Intersection, upload ads, where to place, for how long; write the contract, get that approved, manage their contract through payment.
7. Special projects: strategic partnership with art venues, e.g., Berkeley Rep and ACT, Oakland Symphony; have contract with them to ad in playbills and have partnership, possibly expand on Ms. Spencer's project of performance arts.
8. Cooperative ad program with airlines, when an airline expands service, OAK has a budget that allows them to advertise OAK services and Ms. Holloway works on contracting with them, their ad agency, and OAK's legal and procurement department to get them reimbursed; because air service has expanded, there are 7 different contracts Ms. Holloway is managing with legal, she



writes them, then works with legal, and then with ad agency that works with airline. We want to reimburse the airlines directly as opposed to going through the ad agency.

9. Camelot: ad agency for Southwest, when they start new service, they get \$100,000 for a specific route, we make sure they have professional services contract so we can reimburse them.
10. Decisions: most of my job I've been doing for 5y, so I'm really aware of what needs to be done and what John needs to approve, he wants final approval on all ads; but if agency calls him to ad with their publication, I can say confidently when we can't do it at this time, whether we work with any given vendor; I work with airlines directly on their contracting, provisions, writing them, submit to finance and legal, I do all that on my own.
11. Still manage community relations function.

Additional detail regarding Ms. Heaver's assignments (Ms. Heaver's has only been in her position for a few months and is still learning the full scope):

1. Cultivate and maintain partner relationships, e.g., travel: local destination marketing organizations, Visit Oakland, Visit Berkeley, Visit Napa Valley, Visit TriValley, get better feel for what their communities' needs are in terms of air service; it's a big piece of bringing people into the Bay Area.
2. Relationship with East Bay Economic Development Group, Innovation TriValley, more on corporate side of things, what are corporate needs on air service.
3. Lead event planning efforts, ranging from small inaugural events, e.g., Southwest announces new route to Newark, we do gate event to promote that. Also larger events to promote OAK and East Bay, Airport, at big conferences and conventions and networking events.
4. Implement marketing and promotional strategies; Supervisor and manager come up with big ideas and Ms. Heaver's job is to implement those ideas; help create and implement any collateral, reports, brochures, email marketing, visual presentations, etc. that may be needed.
5. Promo materials: Summer of LOVE campaign in Bay Area, we do mailers and email marketing campaigns.
6. Decisions: the position functions very autonomously, run with big ideas, bring creativity to table, put creative spin on conceptual ideas.
7. Special projects: big event in September, partner with airline partners; finetune and put creative touch on video brochure mailer that was already in place.

Again, as stated above, the breadth and variety of work, and the strategic aspect of the work that has airport-wide impact, in addition to the financial responsibilities, are what distinguish Ms. Holloway's and Ms. Heaver's assignments from Ms. Spencer's.

Aviation Senior Marketing and Commercial Representative

In order to do our due diligence, we also reviewed the classification of Aviation Senior Marketing and Commercial Representative:

Per the classification description, the Aviation Senior Marketing & Communications Representative manages communication between the Oakland International Airport and its key publics to build, manage, and sustain its positive image. This advanced journey-level classification performs the full range of duties in the public relations and marketing field. This classification performs highly independent and specialized public relations work, as well as may functionally and/or technically provide lead direction for professional



and support staff. The incumbent is responsible for handling and maintaining a positive relationship with the media. It is distinguished from the Aviation Supervising Marketing & Communications Representative in that the latter is a supervisory level classification. It is distinguished from the Aviation Associate Marketing & Communications Representative in that the previous is a journey-level classification that performs a limited range of duties in the public relations and marketing field.

The Aviation Senior Marketing and Commercial Representative’s typical job functions include:

1. Assists in managing the Oakland International Airport public relations program including day-to-day management of news media inquiries and press releases.
2. Acts as Oakland International Airport spokesperson and responds to daily questions from all media entities and journalists regarding Airport activities.
3. Writes and distributes all Oakland International Airport press releases; works closely with Airport officials to ensure communication needs are met; ascertains information for developing responses to media inquiries; and distributes press releases via Airport website and media.
4. Plans and implements Oakland International Airport press events including determining location, images being conveyed, time of day date as well as other factors that would help grow the Airport’s image; ensures that Airport officials and VIP’s have prepared written statements; and develops back up plans for press events in the event that unforeseen occurrences disrupt initial plans.
5. Assists in handling the online publication aspects of the Oakland International Airport website including maintaining the publications and ensuring that the information contained on the website is accurate.
6. Manages production of Airport Community Newsletters (Point to Point and Travel Planner); decides the format, layout and images; determines what stories should go into the publication, gathers facts, and works with SME’s to ensure information being included in newsletters is correct; and writes and edits stories for the publications.
7. Develops communications plans and strategies to determine ways to promote, publicize and convey the Airport in a positive light. This includes strategically crafting message points.
8. Coordinates 24/7 media on call calendar for public relations staff.
9. Performs related duties as required.

The Aviation Senior Marketing and Commercial Representative classification does not represent Ms. Spencer’s duties and responsibilities.

Supervisor/Manager Feedback

Brian Kidd, Aviation Supervising Marketing and Commercial Representative, and John Albrecht, Aviation Marketing Manager both provided feedback that Ms. Spencer significantly overstated her responsibilities. Since Mr. Kidd is the supervisor of the department and Mr. Albrecht is the manager, they both do not see that Ms. Spencer has management-level responsibilities, nor is she expected to.

Both Mr. Kidd and Mr. Albrecht provided clarification on several areas in Ms. Spencer’s PDQ:

- Ms. Spencer does not manage employees; she oversees the volunteers of the volunteer program but it is not the same level of responsibility as other supervisors have. She has daily involvement



with a subset of the volunteers in the visitor information program, as stated in her job description. The current size of the program is 53 volunteers and six performers.

- Work priorities are set at the department level. Staff, in concert with the Supervising Marketing and Commercial Representative, are charged with determining the best approaches to executing the objectives in the department work plan.
- Bringing new volunteers into the program is not done without department supervisor involvement.
- Policies are currently only well developed for the visitor information program, not the Customer Survey process or Performing Arts.
- Program budget is determined by the department manager, in consultation with the supervisor, and Ms. Spencer, in coordination with the Supervisor, ensures that program expenditures are within budget.
- Ms. Spencer unilaterally cancelled 1-on-1 meetings with her supervisor, although there is still frequent interaction on a daily basis.
- Ms. Spencer is not in charge of strategic goals.
- Program standards for the visitor information program do exist, to which the volunteers are trained.
- The volunteers, musicians and interviewers are not Port employees, and as such are not subject to the same standards and processes of protection, hiring, termination and evaluation.
- Duties in section #7.0 of the PDQ are overstated; throughout, "coordinate" rather than "manage" is a more accurate verb/term.
- Activity #13 in section 7.0 in the PDQ has not occurred, i.e., provide Integrated Technology Options-Airport Kiosks, Service Robots.
- 7.0 Task #20 "HR oversight" is not an appropriate description; again, "coordination" is a better term.
- 7.0 Tasks #25 -28 have not occurred; i.e., maintain creative brand for OAK performance arts program: signage, outreach materials etc.; develop marketing partnership opportunities with local performing arts programs and entertainment venues to diversify performance types; customer relations: execute passenger retention projects: determine incentives and proposed amenities; nor implement customer service values: reengage Port Aviation employees, OAK tenants, volunteers and partners.
- Position responsibilities have not changed in the past two years.
- Human Resources management skills are not required.
- Fundraising strategies are no longer required as it was determined several years ago that this effort was not an efficient use of staff time.
- Volunteers and performers are not paid; they receive a small snack stipend, a shift stipend set by policy determined by the Supervisor to help fill certain shifts with low demand, and are reimbursed for mileage according to existing policy.
- The performance arts and survey programs have not matured to their full potential. Again, policies are set at the supervisor or manager level.

Recommendation

Per our analysis, it does not appear that Ms. Spencer's position is a good fit for any of the other levels within the Aviation Marketing and Commercial Representative class series. Each level has a classification description that is very specific to the assignments of each level. The Assistant-level is specifically designed around Ms. Spencer's assignments and still is the best fit for her position. While the Customer



Survey and Performance Arts assignments are not specifically called out in the class description, they are not considered two completely new and separate programs requiring additional skill sets but rather are an extension of the Volunteer Program. In comparison to other levels with the Aviation Marketing and Commercial Representative class series, Ms. Spencer's position is not a fit for the Associate or Senior level, per analysis above.

On August 7, 2017, Ms. Spencer submitted additional information to be considered for this analysis, and we feel that this information confirms the tactical and coordinative nature of her position. Each assignment is a directive to carry out specific day-to-day operational responsibilities within the three program areas assigned to Ms. Spencer.

In her PDQ, Ms. Spencer suggested other options for reclassification at a Manager level but, again, per our analysis, her position does not rise to the level of a manager as her assignments lack in the strategic and financial impact that typical manager positions have. In addition, Ms. Spencer reports to a Supervisor who, in turn, reports to a Manager-level, a hierarchy that places strategic and financial responsibilities at the Supervisor and Manager levels. A Manager title/classification does not appear appropriate for Ms. Spencer's position.

Recommendation

No change to Ms. Spencer's classification of Aviation Assistant Marketing and Commercial Representative.

We want to thank the Port of Oakland for its time and cooperation in bringing this study to a successful conclusion. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report of our analysis, findings, and recommendations.

Respectfully Submitted by
Koff & Associates

Georg S. Krammer
Chief Executive Officer

EXHIBIT D

Port Personnel Rules and Procedures

plan; and the position shall be related to other positions of its kind in the Port service.

- (f) **Statement of Minimum Qualifications:** The statement of qualifications in a class specification is intended to be used in determining the admissibility of applicants to competitive examinations, and as an aid in the preparation of such examinations. The minimum qualifications may also be used in determining the relationship between positions in one class and positions in other classes. The Executive Director or his/her designee, after consultation with the appointing authority, shall determine desired combinations of training and experience as minimum qualifications for the respective classes and, subject to Civil Service Board approval, these minimum qualifications shall become part of the class specification.

Section 3.03 - Title of Positions. The class title of a position shall be used to designate such position in all budgets, payrolls, the Port's Staffing Plan, and other official records in connection with all personnel transactions. No employee shall be appointed, employed or paid under any title or position other than that to which he/she was appointed, except in cases of acting pay.

Section 3.04 - Administration and Maintenance of the Classification Plan.

- (a) **Responsibilities of the Personnel Director and the Civil Service Board:** The Civil Service Board shall oversee and the Personnel Director shall administer and maintain the classification plan.
- (b) **Creation of New Classifications:** New classifications in the competitive Civil Service shall be subject to meet and confer to the extent required by law and shall become effective upon approval by the Civil Service Board as is consistent with City Charter Section 706(21) and Oakland Municipal Code Section 2.08.050 and ratification by the Board of Port Commissioners. In recommending the establishment of a new classification, the Executive Director or his/her designee shall submit to the Civil Service Board a class title and specification for such classification. The date of the Civil Service Board's and the Board of Port Commissioners' action shall be included on new class specifications.
- (c) **Amendments to Class Specifications:** Amendments to existing class specifications that fall within the mandatory scope of bargaining shall be subject to meet and confer. In the event that the affected union agrees with the proposed amendments, the amended class specification shall be effective upon approval by the Executive Director or his/her designee, subject to the following: first ratification on a consent calendar at the next regularly scheduled meeting of the Civil Service Board; second, adoption on a consent calendar at the next regularly scheduled meeting of the Board of Port Commissioners.

In the event that the Port and affected union do not come to agreement on the proposed amendments, the amendments shall be calendared for approval at the next regularly scheduled meeting of the Civil Service Board. The union and the Executive Director or his/her designee shall have the opportunity to be heard by

Port Personnel Rules and Procedures

the Civil Service Board at such meeting before the proposed amendment is effective. It will also be subject to adoption by the Board of Port Commissioners.

The date of the Civil Service Board's and the Board of Port Commissioners' action shall be included on amended class specifications.

- (d) **Classification Studies:** The Executive Director or his/her designee and/or the Personnel Director may initiate and conduct classification studies of any Port positions in the competitive civil service when he/she deems such study necessary, and shall recommend a change in classification where the facts warrant such action.

An employee who contends that he/she is working outside of her/his classification or who contends that her/his position has been improperly classified may submit to the Executive Director or his/her designee a request for a classification study. The Executive Director or his/her designee shall review such request and take further action as he/she deems appropriate, subject to appeal to the Civil Service Board as provided in section 3.04(e) of these Rules.

- (e) **Appeal to Civil Service Board regarding Changes in Classification:** In the event the Executive Director or his/her designee has made a decision regarding a change to an employee's classification or regarding an employee's request for review of her/his classification, and the affected employee does not agree with this decision, the employee or affected union shall have an opportunity to be heard by the Civil Service Board before the Executive Director's decision becomes effective. The employee shall file an appeal with the Secretary to the Civil Service Board within fifteen (15) working days of notice of the Executive Director's decision. A letter sent to the affected employee's address of record via regular and certified mail, or hand delivered to the affected employee, shall constitute notification. At the hearing, the appointing authority, employee and/or affected union shall have an opportunity to present their positions, either orally or in writing. The Executive Director or her/his designee shall also have an opportunity to be heard by the Civil Service Board. The Civil Service Board shall issue a final and binding decision regarding the classification issue in dispute.

- (f) **Quarterly Updates:** For both employee and employer initiated classification studies, the Executive Director or his/her designee shall provide quarterly updates to the Civil Service Board, the Board of Port Commissioners and the affected employee. For any classification studies pending for more than one (1) year, the update shall be accompanied by an explanation for the delay. An employee may request an update on her/his employee request for classification study at any time.

Section 3.05 – Treatment of Incumbents as a Result of Reclassification of Positions. In the event of a classification study, incumbents may be upgraded, downgraded or unchanged. Should an incumbent be upgraded or downgraded, the following shall occur:

- (a) **Upgrading of Position:** When a position is reclassified to a class of higher grade, the incumbent may be assigned to the class of higher grade without examination providing he/she has performed the duties of the class for one year prior to the

EXHIBIT E



INSTRUCTIONS FOR THE POSITION DESCRIPTION QUESTIONNAIRE

The purpose of this questionnaire is to provide a complete description of your presently assigned duties. Should you be promoted, transferred, etc., this questionnaire should describe the work your replacement would be expected to perform.

This questionnaire is NOT a statement of your personal qualifications, NOT a measure of your individual competency, NOT concerned with amount or quality of your work, and NOT used for determining the number of positions needed.

In answering the questions, please be accurate and thorough. Also:

- Read all of the questions and instructions before beginning.
- If possible, allow more than one session for completing this. You may wish to respond to some questions first, then put it aside and return to it later.
- Do not use terms or abbreviations without writing out what they stand for (e.g., PDQ = Position Description Questionnaire).
- If you need more space to answer any of the questions, staple on additional sheets as necessary and label them with your name.
- If a question does not apply to your job, please write "n/a" in the blank.

When you have completed the questionnaire, turn it in to your immediate supervisor. It is due to your supervisor on

Question 2.5: This question does not refer to an annual performance appraisal. Rather, think in terms of how frequently you discuss assignments with your supervisor, how errors might be discovered, when and how frequently your day-to-day work is read over or otherwise reviewed, and related mechanisms by which guidance is given.

Question 6: Refer to the examples of duty statements below to help you in describing your own job:

Unclear Duty Statements

Handle correspondence.

Counsel clients.

Maintain grounds and landscaped areas.

Clearer Duty Statements

Receive, open, time stamp, sort, and route incoming mail.

Explain program eligibility standards and procedures to clients and assist them in completing forms.

Mow lawns with hand and power mowers. Rake and weed flowerbeds. Prune bushes. Trim trees from ladder or bucket truck, using hand and power saws.

SUPERVISORY POSITIONS: If you supervise other employees, and are completing this questionnaire regarding your own job, please attach an organization chart showing the positions that report to you.



POSITION DESCRIPTION QUESTIONNAIRE

Name: Lakita Spencer	Class Title: Aviation Assistant Marketing & Commercial Representative		
Department: Aviation Marketing & Communications	Division: Aviation		
Work Address: 9532 Earhart Road, Suite 205 Oakland, CA 94621			
Work Phone: 510.563.2846	E-mail Address: lspencer@portoakland.com		
Work Shift: Day	Time in Current Job: 9.5 years	Time with the Agency: 9.5 years	

Koff & Associates will try to interview all employees in single-incumbent classifications and a representative number of employees (in a group setting) for multi-incumbent classifications. Please indicate with a check mark if you desire an individual interview.

1.0 PURPOSE: Briefly summarize the overall purpose of your position:

I am responsible for managing the Visitor Information Program (VIP) and the 70+ volunteers who staff the visitor information centers in the Oakland International Airport. In addition, I manage the Performance Arts performers and the Customer Satisfaction Survey team which are a part of the customer relations program. My job is to ensure that our customers and tenants receive service that represents OAK's customer service values. OAK volunteers are an essential part of how our airport provides customer service. Individuals in each program support our ability to enhance our existing passenger services and provide a valuable information resource to airport customers.

2.0 ORGANIZATIONAL CONTEXT: SUPERVISION RECEIVED

2.1 I report to: Brian Kidd, Aviation Marketing Supervisor (Name and title of immediate supervisor)
bkidd@portoakland.com (E-mail Address)

As do:

<i>Job Title</i>	<i>Name</i>
<u>Aviation Associate Marketing & Communications Representative</u>	<u>Joanne Holloway</u>
_____	_____
_____	_____

2.2 How are your work priorities set? (By you, by your supervisor, standard procedures, etc.)

I typically set my own work priorities, taking into consideration the department work plan/needs.

2.3 Describe the work decisions that you make on your own:

- Design, plan and direct volunteer programs that augment the services of Port of Oakland employees.
- Recruit, interview, hire, train, schedule and terminate volunteer staff.
- Handle general personnel related matters. (Team building, Conflict Resolution etc.)
- Develop and implement program policies for the Visitor Information, Customer Satisfaction Survey and Performance Arts Program.



- Provide and present information related to the airport facilities and features to enhance OAK's visibility and usage; Offer escort and tour support for airline or community partner events.
- Design and implement training needed to ensure volunteer staff are compliance with FAA background and Computer based Training (CBT) Requirements.
- Determine the permitted content that will be distributed at each information center.
- Determine content distribution for all volunteer staff correspondence.
- Monitor volunteer staff performance.
- Facilitate Quarterly Staff Meetings and briefings for Customer Service Survey Team.
- Conduct observational audits to ensure current and accurate information is provided to the customers and that we have adequate coverage, accountability and consistency.
- Administer program budget, document reimbursements and other expenditures.
- Coach, mentor and challenge volunteer staff to ensure continuous improvement and customer service strategy.
- Identify potential partnership opportunities with local performance arts schools and community organizations.

2.4 What decisions do you refer to your supervisor, or to other departments within the organization?

Some Budgetary approvals for larger items, Signatory Requests, Badging requests, Performance Arts vetting (Inclusive of all department team members), payroll related items, work plan action items.

2.5 How is your work checked in order to eliminate or reduce errors?

I provide written documentation in the form of reports, metrics, visual presentations and summaries.

2.6 What types of guidance are used to aid you in the performance of your duties? (Desk manuals, departmental procedures, established practices, regulations, etc.). Please explain.

My established procedures are based on general Port of Oakland policies and the current volunteer codes of conduct. I maintain a volunteer management program guide which I designed. I work from the customer service branding and messaging initiatives started in 2011. The established practices are based on my 16+ years' experience with managing large workforces, program management and customer service experience.

2.7 How often do you meet with your supervisor? (daily, weekly, monthly, as needed, rarely). Please explain.

I meet with my supervisor as needed.

3.0 ORGANIZATIONAL CONTEXT: SUPERVISORY DUTIES

3.1 Does this position supervise other employees? (Yes/No -- If No, skip Part 3)

Yes, I manage a substantial size group and I perform supervisory and lead responsibilities for a team that is equivalent to the supervision paid employees receive. In my position, I am primarily responsible for analyzing what expertise is needed to achieve the business and/or strategic goals of the Port of Oakland & Oakland International Airport.

At present, the significance of volunteer involvement is unrecognized by Port management in regards to how volunteer participation advances our organization mission. In spite of the lack of recognition a budget has implemented for the past 30 years for the purposes of recruiting, training, supervising and recognizing volunteers for the specialized skills they provide.



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Volunteers in the Visitor Information Program and Customer Service Satisfaction Survey Program are compensated by stipends in excess of \$500.00 a year and receive a 1099 from Port of Oakland. OAK volunteers receive this stipend based on the number of volunteer shifts per month and hours worked by each volunteer which are in four hour increments. Additional compensation is given if additional time above the required minimum is spent on shifts over an excess of two hours. Volunteers are also given a \$50.00 gift card annually for recognition of services performed.

According to the Department of Labor and the IRS stipends or cash gifts of any amount (event allowable "nominal" stipends to bona fide volunteers) are generally taxable income. So by definition "volunteers" who receive anything of value exceeding \$500 a year, must be treated as paid staff or as an independent contractor and relinquish important liability protection under the federal Volunteer Protection Act (as well as become potentially liable, in the case of independent contractor classification, for self-employment taxes).

See more at: <http://www.forthepurposeoflaw.com/appreciating-volunteers/#sthash.8Zalgt5u.dpuf>

3.2 Name and title of employees that you directly supervise:

<i>Job Title</i>	<i>Name</i>
<u>Visitor Information Program Volunteer Staff</u>	<u>See Attached Roster</u>
<u>Performance Arts Musicians</u>	<u>See Attached Roster</u>
<u>Customer Satisfaction Surveyors</u>	<u>See Attached Roster</u>
_____	_____
_____	_____

3.3 What is the nature and extent of the responsibility for employees under your supervision? Check all which apply:

<i>Check that applies</i>		<i>Approve</i>	<i>Recommend</i>	
<input checked="" type="checkbox"/>	Plan work of others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Hire new employees
<input checked="" type="checkbox"/>	Distribute work to others	<input checked="" type="checkbox"/>		Terminate employees
<input checked="" type="checkbox"/>	Check work of others			Promote employees
<input checked="" type="checkbox"/>	Approve work of others			Demote employees
<input checked="" type="checkbox"/>	Train employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Discipline employees
<input checked="" type="checkbox"/>	Evaluate performance	<input checked="" type="checkbox"/>		Approve leave
<input checked="" type="checkbox"/>	Establish unit policy/procedure			Approve pay increases
	Other, Please list:			Other, Please list:

4.0 EQUIPMENT: List any machines, equipment, or vehicles you regularly operate in the course of work. (e.g. computer, telephone, lawn mower, truck, etc.)

<i>Type of Machinery/Equipment</i>	<i>Purpose for Which You Use It</i>	<i>What You do With It</i>
<u>Computer</u>	<u>To carry out my work duties</u>	<u>Scheduling, Recruitment, Reports, etc.</u>
<u>Telephone</u>	<u>To carry out my work duties</u>	<u>Correspondence with program staff, OAK tenants and Port vendors.</u>
<u>Port Vehicle</u>	<u>To carry out my work duties</u>	<u>Deliver supplies to information center, meet ground transportation suppliers and Port Vendors.</u>
_____	_____	_____



_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5.0 CONTACTS: Other than your supervisor and coworkers, with whom do you have contact in the course of your work, and how frequently? (*D=daily, W=weekly, M=monthly, I=infrequently: several times a year or less*)

<i>Title</i>	<i>Regarding</i>	<i>Frequency</i>
New & existing information booth/surveyor/performer inquiries	Recruitment, hiring process, interviews, training, parking, badging and program benefits.	Daily
Airport concessionaires	Customer inquiries	Daily/Weekly
Certified Folder Display	Information booth stocking	Monthly
AC Transit	Information booth stocking	Weekly/Monthly
BART	Information booth stocking	Monthly
Capital Corridor/Amtrak	Information booth stocking	Monthly
Airline Station Managers	Airport operations	Weekly/Monthly
Visit Oakland	Partnership opportunities, tourism	Weekly/Monthly
Port Vendors	Procurement of goods and services, Accounts Payable Inquiries	Daily/Weekly

6.0 BUDGET: Total dollar amount of budget under your control: **97,600**

6.1 Describe your responsibility for budget expenditures and control over revenue generation or cost savings:

I am responsible for administration of volunteer stipend reimbursements quarterly for mileages, meals and shift premiums. Surveyors also receive a paid shift premium that is issued quarterly. Included in our budget are costs for uniforms, supplies, survey gift incentives, survey & volunteer management software subscriptions, recognition awards and etc. Due to the customer satisfaction survey program being billed to the previous customer service budget line item I frequently look for cost saving opportunities. Scheduling is also done based on budget availability. Due to the number of hours most volunteers work in program they are issued 1099's each year.

I do make recommendations on possible revenue generating or cost savings opportunities for my program area and the Aviation Marketing department. In my position, I process monthly and contract payments ensuring items are allocated to the correct budget codes. I review monthly expenditure reports issued by finance and I run supplier history and accounts payable inquiry reports as necessary for my program, the department supervisor and other Aviation Marketing team members. The procurement responsibilities are divided between myself and Joanne Holloway who is in the Aviation Associate position.



7.0 DESCRIPTION OF YOUR WORK: Describe below the work that you perform, starting with your most important duties. (See example below)

- First number your duties in the # column.
- Skip to the **DUTIES** column, and describe what tasks you perform, beginning each statement with an action verb.
- Go back to the **TIME** column, and indicate what percentage of your overall work time you spend performing each duty. If percentages are too difficult, use hours per day, week or month; or, for seasonal duties, show number of days or weeks per year.
- In the **FREQ** column, indicate how frequently the task occurs, using the following codes:
SD=several times daily; D=daily; W=weekly; M=monthly; I=infrequently: several times a year or less.
- In the **IMP** column, identify how important the duty is to your overall job effectiveness, using the following codes:
*C=This task is Critical, and the job is a failure if this task is not performed properly.
 E=This task is Essential, and must be performed properly for job success.
 I=This task is Important, and may have a big impact, but does not necessarily result in failure if not performed properly, e.g. because errors can be corrected.
 M=This task is minor or incidental, and can be performed by others or deferred without major impact.*

#	TIME	FREQ	IMP	
1	30%	D	E	<i>(EXAMPLE) Explain program eligibility standards and procedures to clients and assist them in competing forms.</i>
2	40%	SD	C	Visitor Information Program: Manage 70+ volunteers, Ensure program compliance with the Port Strategic goals, oversee daily volunteer activities, evaluate performance, reward strong performance and address performance issues.
3		SD	C	Manage online volunteer shift assignment scheduling, timesheets, personnel updates and volunteer announcements.
4		M	C	Manage Volunteer Program Benefits- Volunteer Stipend Reimbursements and Non Shift Parking Requests.
5		W	E	Recruit, Screen and Train new volunteers- Advertising, online recruitment, Bi-lingual & ASL recruitment.
6		M	E	Design Visitor Information/Program Guide/ Signage Updates.
7		D	E	Coordinate Convention Visitor Bureau (CVB) deliveries, stock and monitor availability of local convention & visitor bureau travel guides and ground transportation information.
8		M	E	Maintain and update airport resources, ground transportation and hospitality program guide for volunteer team.
9		I	E	Plan and execute Quarterly Staff Meetings for volunteer team
10		M	C	Assist volunteers with completing and passing FAA background checks and Computer Based Training (CBT) Requirements
11		M	E	Develop and provide ongoing computer, customer service and ADA trainings.
12		D	C	Oversee Information Booth Stocking.
13		I	I	Provide Integrated Technology Options- Airport Kiosks, Service Robots.
14		I	E	Plan recognition and volunteer excursion events.
15		I	E	Assist with Aviation Marketing special events.
16	20%	M	E	Customer Satisfaction Experience Survey: Execute annual plan for volunteer interviewers.
17		D	C	Manage In-Terminal Survey processes and policies.
18		M	C	Train and manage Customer Satisfaction surveyor team.
19		M	I	Plan and lead briefings with survey team to ensure we meet quarterly quotas.



20	15%	D	C	OAK's Performance Arts Program- Manage overall program. Provide HR oversight (recruitment, auditions, scheduling)
21		I	I	Maintain performance arts signage and In-Terminal welcome banners.
22		M	C	Develop and implement procedures for related terminal signage and notifications, including featuring schedule of performances on social media websites and employee communications.
23		I	I	Manage parking request and compliance for OAK performance arts program.
24		M	I	Secure OAK performance arts program sponsorship, bring performers post-security, set-up branded stages
25		I	E	Maintain creative brand for OAK performance arts program: Signage, Outreach materials and etc.
26		M	E	Develop marketing partnership opportunities with local performing arts programs and entertainment venues to diversify performance types.
27	15%	W	E	Customer Relations: Execute passenger retention projects: Determine incentives and proposed amenities
28		D	E	Implement customer service values: Re-engage Port Aviation employees, OAK tenants, volunteers and partners.
29	10%	D	C	Oracle: Process monthly and contract payments for department.
30		W	C	Oracle: Process payroll and maintenance work orders as needed.
31		W	C	Oracle: Manage vendor verifications and compliance- Includes payment coordination, reconciliation, subscriptions and etc.

7.1 Which of your duties do you consider most complex or difficult, and why?
 Managing conflict within the volunteer team, maintaining morale and working with an aging demographic. In general, change is very difficult and the team has historically been made up of retired seniors. Many of these seniors do not use computers and this has become a significant proponent to fulfilling the duties required to work in the information centers. Also, we face difficulties in addressing how we retire volunteers who are no longer able to meet the demands of the position. For many the position is a part of their livelihood and it can be difficult for them to let go.

7.2 If your position responsibilities have changed significantly in the past two years, please explain how:
 I received additional work responsibilities from the Aviation Associate position when staff member Rosemary Barnes resigned around 2012. At the time Mrs. Barnes resigned she was primarily responsible for implementing customer service initiatives and managed the customer relations program. Ms. Barnes work plan included implementation and management of engaging Airport staff, tenants and partners around our customer service excellence program. The program coordination included updating our customer service wall and the OAK's performance Arts program. Since Ms. Barnes left the organization I was responsible for designing and maintaining the content updates on the customer service wall and re-vamping the Performance arts program. Prior to Mrs. Barnes these duties were carried out by Associate level staff Joanne Holloway. Aviation Associate Joanne Holloway also managed the Performance Arts program from its inception. Ms. Holloway was also responsible for coordinating our in-terminal passenger survey's which were administered by ASQ an outside firm. When I was assigned the Customer



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Satisfaction Survey program I was tasked with recruiting an internal team using the volunteer management strategies I currently implement overseeing the Visitor Information Program.

I have worked collaboratively with both Associate Representatives Joanne Holloway and Rosemary Barnes to design presentations, suggest practices and implementation guidelines for improving the terminal experience and engaging OAK customers. This is a significant part of my day to day responsibilities.

Initially, I was hired solely to coordinate the Visitor Information program. Over the past nine years my position responsibilities for managing the VIP program have expanded, my work responsibilities have increased to managing three programs concurrently, therefore exceeding the scope of my current classification.



8.0 EDUCATION

8.1 What level of education do you have and what minimum level of education do you believe is needed to satisfactorily perform your job at the time of hire? Mark the level that applies to your job:

You Have	Min Req'd	
()	()	Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
(✓)	(✓)	High School Diploma or equivalent (G.E.D.)
()	()	Up to one year of specialized or technical training beyond high school
()	()	Associate degree (A.S., A.A.) or two-year technical certificate, Type:
()	()	Bachelor's degree: Type:
()	()	Master's degree: Type:
(✓)	()	Other (explain): Completed 205 credit hours at Portland State University and recently the University of Phoenix. My major was in Marketing and Business Administration. I also double majored in Community Development and Ethnic studies. Degree incomplete due to required Medical Withdrawal.

8.2 List the types of skills, knowledge, and experience needed to start on this job:

Knowledge of:

- Management and Leadership Principles
- Budget, assessment of program/staff needs, Advocacy
- Management of Human Resources including: recruiting, hiring, training, supervising, firing and scheduling.
- Travel and/or airline industry
- Fundraising strategies in seeking gifts for annual recognition luncheon.

Skill

- Effective in management of a large staff of Visitor Information service providers.
- Ability to create and maintain strong, positive interpersonal relationships with salaried and non-salaried staff.
- Use extensive experience and judgment to plan and accomplish goals.

Ability

- Ability to provide accurate monthly reports and quarterly payroll/ reimbursements by utilizing computer programs: Microsoft Word, Excel and Access.



- Communicate effectively orally and in writing to generate reports, memos, correspondence and other written materials that are clear, concise, well-organized and grammatically correct.
- Ability to clearly and consistently articulate a positive point of view about volunteers and OAK's VIP program.
- Ability to set vision of what volunteers can accomplish and of where the agency might go in the future.
- Ability to maintain flexibility, especially towards the demands of scheduling a large volunteer workforce.

8.3 List below any licenses, professional or technical certificates that you currently hold. Indicate whether it is required for your current position.

Certificate – Licenses	Required (Yes/No)

9.0 **SENSORY DEMANDS:** Indicate which sensory abilities are required in the performance of your job, and: In the **FREQ** column, show how often you use the sensory ability in the course of your work. Use these codes: **SD**=several times daily; **D**=daily; **W**=weekly; **M**=monthly; **I**=infrequently; several times a year or less.

Yes / No	Sensory Demand	FREQ
YES	SIGHT in order to <u>complete assigned work projects</u>	SD
YES	COLOR VISION in order to <u>complete assigned work projects</u>	SD
YES	HEARING in order to <u>complete assigned work projects</u>	SD
NO	SMELL in order to _____	NA
YES	SPEECH in order to <u>complete assigned work projects</u>	SD
NO	TOUCH in order to _____	NA

10.0 **PHYSICAL DEMANDS:** Indicate which physical abilities are required in the performance of your job, and: In the **FREQ** column, show how often you perform the physical activity in the course of your work. Use these codes: **SD**=several times daily; **D**=daily; **W**=weekly; **M**=monthly; **I**=infrequently; several times a year or less.

Yes / No	Physical Demand	FREQ
YES	SITTING in order to _____	D
YES	STANDING in order to _____	D
YES	WALKING in order to <u>provide program oversight, verify required passenger amenities and determine set-up for OAK Performance Arts program.</u>	D
NO	RUNNING in order to _____	NA
NO	CLIMBING in order to _____	NA
YES	BENDING in order to <u>stock information centers</u>	W
NO	STOOPING in order to _____	NA
NO	KNEELING in order to _____	NA
	HAND/FINGER MOVEMENT:	



NO	GRASPING in order to _____	NA
NO	FINE MANIPULATION in order to _____	NA
YES	LIFTING in order to stock information center _____ Avg # lbs: 10 Max # lbs: _____	W
YES	CARRYING in order to distribute program supplies and ground transportation materials Avg # lbs: _____ Max # lbs: _____ Avg dist: _____ ft. Max dist: _____ ft.	D
NO	PUSHING in order to _____ Avg # lbs: _____ Max # lbs: _____ Avg dist: _____ ft. Max dist: _____ ft.	NA
NO	UNUSUAL FATIGUE FACTORS (e.g., wearing heavy protective clothing)	NA
	OTHER physical demands (list and explain): _____	

11.0 ENVIRONMENTAL CONDITIONS: Indicate which conditions are required in the performance of your job, and: In the **FREQ** column, show how often you work in the environmental condition. Use these codes: *SD*=several times daily; *D*=daily; *W*=weekly; *M*=monthly; *I*=infrequently; several times a year or less.

Yes / No	Environmental Condition	FREQ
YES	Typical office conditions: Standard business operations	D
NO	Work outdoors: _____	NA
NO	Exposure to extreme temperatures: _____	NA
NO	Exposure to extreme weather conditions: _____	NA
NO	Exposure to toxic/poisonous substances: _____	NA
NO	Exposure to biologic/infectious agents: _____	NA
NO	Exposure to dust, fumes, and/or allergens: _____	NA
NO	Exposure to excessive noise: _____	NA
NO	Exposure to unpleasant odors: _____	NA
NO	Exposure to vermin, insects, parasites etc.: _____	NA
NO	Work near hazardous/moving equipment or machinery: _____	NA
NO	Work at heights: _____	NA
NO	Work below ground: _____	NA
NO	Use protective clothing, equipment, devices, materials: _____	NA
NO	Work with hostile, violent and/or offensive individuals: _____	NA
NO	Other environmental conditions (list and explain): _____	NA

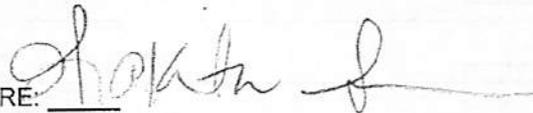


12.0 OTHER: Add items or comments about your present job that you feel has not been adequately covered by this questionnaire:

Currently my position classification states "The work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility." These characteristics defined above are what distinguish my position from the next higher level, the Aviation Associate Marketing & Commercial Representative which states that it supervises support staff. The same definition exists in Senior, Aviation Marketing & Communication position. I would affirm that based on the information submitted I do perform supervisory job functions and have lead responsibilities. The volunteer are "support staff" based on the nature of the essential duties they perform.

In conclusion, it is important to note that in the Aviation industry my counterparts are acknowledged for the level of management it takes to coordinate volunteer staffing teams. Volunteer staffing team are an integral component to OAK airports ability to provide customer service. My position is unique few staff supervise a team similar in size. Customarily my position in other airports is at manager or director level. It may be as a Director of Volunteer Services, Director of Customer Services, Volunteer Program Manager or Customer Service Manager. There is a significant amount of time that goes into overseeing the volunteer operations of all three programs I manage. Also the Performance Arts Program, Survey and Custom Relations program has historically been implemented and managed by a higher classification.

13.0 EMPLOYEE CERTIFICATION: All statements made by me on this questionnaire are, to the best of my knowledge, complete and accurate.

SIGNATURE: 

DATE: 3/30/17



EMPLOYEE NAME: _____

IMMEDIATE SUPERVISOR'S COMMENTS

Instructions: Review the employee's questionnaire carefully to see that it is accurate and complete. Do not change or alter the employee's statements or entries in the questionnaire. If you feel that the employee's description is not accurate, use the spaces provided below to clarify or elaborate on the description. Do not make any statements or comments about the employee's work performance or competence.

How long have you supervised this employee? 5 years

Which of the employee's duties do you consider most important or difficult?

Train and maintain to consistent levels of customer service at information booth.

If you had to replace the employee, what qualifications would be most important to you? What would the minimum educational and experience requirements be?

B.A. plus 3 years customer service experience in front-line setting

Do you agree with the employee's description of his/her work job and its requirements? No

Use this space to add information or clarification to the employee's questionnaire.

See attached ~~HR~~ memo for additional comments.

Except as noted above, the employee's questionnaire is an accurate and complete representation of his/her work.

SIGNATURE: [Signature]

DATE: 4/19/2017

Print name and title: Brian Kidd, Aviation Supervising Marketing and Communications Representative

DEPARTMENT MANAGER'S COMMENTS

Which of the employee's duties do you consider most important or difficult?

STAFFING OF INFORMATION BOOTH DURING PEAK HOURS

Use this space to add information or clarification to the questionnaire, or other pertinent information.

See ATTACHMENT, NUMEROUS VARIANCES NOTED

Except as noted above, the employee's questionnaire is an accurate and complete representation of his/her work.

SIGNATURE: [Signature]

DATE: 26 May 17

Print name and title: Joyce AUBREY

Oakland International Airport Volunteer Service Summary
March 30, 2017

Place	Assignment	2010 Hours	2011 Hours	2012 Hours	2013 Hours	2014 Hours	2015 Hours	2016 Hours	2017 Hours	Total Hours
Customer Satisfaction Survey	T2X- Post Security	0	0	0	0	478.38	46.13	422.15	109.77	1,056.43
	Terminal 1 Post- Security	0	0	0	194.03	400.58	639.5	152.07	30.48	1,416.67
	Terminal 2 Post- Security	0	0	0	22.52	169.38	270.2	105.30	0	567.40
Total		0	0	0	216.55	1,048.35	955.83	679.52	140.25	3,040.50
OAK Airport Buskers Program	Terminal 1 Pre-Security	0	0	0	2	0.00	0	0.00	0	2.00
* Busker's do not sign into Volgistics	Terminal 2 Meet n Greet Area	0	0	0	4	0.00	0	0.00	0	4.00
	Terminal 2 Post-Security	0	0	0	0	0.00	4.18	0.00	0	4.18
Total		0	0	0	6	0.00	4.18	0.00	0	10.18
OAK Volunteer Information Services	Office Support	0	0	0	323.92	696.48	325.8	0.00	0	1,346.20
	Terminal 1- 2nd Person 2	0	0	0	37.18	1,008.00	895.1	1,019.53	434.3	3,394.12
	Terminal 1- 2nd Person	1,007.93	2,183.82	1,901.27	67.35	0.00	0	307.37	0	5,467.73
	Terminal 1-1st Person	2,232.13	4,756.68	4,111.43	5,032.83	4,772.53	4,595.87	4,483.37	1,167.55	31,152.40
	Terminal 2- 1st Person	1,443.22	3,588.78	4,207.48	4,802.37	4,275.83	3,677.02	4,290.12	1,106.80	27,391.62
	Terminal 2- 2nd Person	602.85	1,922.78	1,967.40	2,265.58	2,236.88	2,621.33	2,277.65	452.47	14,346.95
	Trainee T1	0	0	0	0	0.00	0	235.45	6.58	242.03
	Trainee Terminal II	0	0	0	0	0.00	0	45.35	31.12	76.47
	Trainee	0	0	192.6	167.55	106.35	43.52	47.42	0	557.43
Total		5,286.13	12,452.07	12,380.18	12,696.78	13,096.08	12,158.63	12,706.25	3,198.82	83,974.95
(None)	(None)	105.8	159.27	209.87	104.37	346.15	64.13	51.12	15.08	1,056.78
Total		105.8	159.27	209.87	104.37	346.15	64.13	51.12	15.08	1,056.78
Grand total		5,391.93	12,611.33	12,590.05	13,023.70	14,490.58	13,182.78	13,436.88	3,355.15	88,082.42

OAK Volunteers

Avila, Vic
Barnes, Eleanor
Blanchard, Fred
Blanchard, Mary
Boo, Navarone
Bradford, Robert + 2
Brewer, Terrence
Brill, Bruce
Brox-Chester, Shelia
Buggs, De'Andre
Bullard, Patricia
Campbell, Tasha
Carr, Murphy
Christian-Daniels, Gayle
Clare, Dharini
Cooper, William
El-Amin, Tariq
Escobedo, Eric + 1
Estrada, Alexander
Fontes, Paul
Foster, Karen
Franco, Victor
Gaines, Florence
Gebreamlak, Genet
Geha, Charles
Gordon, Willynnda
Greenhill, Julian
Hankerson, Annette
Hargrove, Roy (Sonny)
Ho, Maggie
Hoang, Maggie
James, Thelma
Johnson, Carole
Johnson, Gordon
Johnson, Phyllis L
Kidd, Cheryal
King, Brenda
Klouidakis, Mike
Larson, Susan
Lorenzana, Cecilia
Lutsch, James
McCoy, Janett
McDonald, Janice
McFarland, Lula
Meija, Josefina

Blanchard, Mary
Mills-Breaux, Zenobia
Moore, Elizabeth
Moore, Kenneth
Nichols, Andrew
Perlin, Howie
Petersen, Joan
Phillips, Sylvia
Reddick, Joyce
Ross, Patricia +1
Scott, Jacqueline
Simmons, Angel+2
Spencer - Smith, Ethel
Stefani, Pattie
Taylor, Beatriz
Taylor, Carolyn
Townes, Velma
Villanueva, Alejandro
Walker, Ann
Wegener, Virginia
Wesley, Sandra
Young, Kimberly

Additional Comments re: Lakita Spencer Desk Audit, 4/10/2017

- 1.0 Ms. Spencer does not manage employees. She has daily involvement with a subset of the volunteers in the visitor information program, as stated in her job description. The current size of the program is 53 volunteers and six performers.
- 2.2 Work priorities are set at the department level. Staff, in concert with the Supervising Associate, are charged with determining the best approaches to executing the objectives in the department work plan.
- 2.3 Bringing new volunteers into the program is not done without department supervisor involvement.
- 2.3 Policies are currently only well developed for the visitor information program.
- 2.3 Program budget is determined by the department manager, in consultation with the supervisor, and the Associate, in coordination with the Supervisor, ensures that program expenditures are within budget.
- 2.7 Ms. Spencer unilaterally cancelled 1-on-1 meetings with her supervisor, although there is still frequent interaction on a daily basis.
- 3.1 Ms. Spencer does not supervise employees.
- 3.1 Ms. Spencer is not in charge of strategic goals.
- 3.1 Program standards for the visitor information program do exist, to which the volunteers are trained.
- 3.2 and 3.3 The volunteers, musicians and interviewers are not Port employees, and as such are not subject to the same standards and processes of protection, hiring, termination and evaluation.
- 7.0 #2 duties are overstated, as indicated above. Throughout, "coordinate" rather than "manage" is a more accurate term.
- 7.0 Activity #13 has not occurred.
- 7.0 The policies for activities #17 and 18 are set by the department supervisor.
- 7.0 Task #20 "HR oversight" is not an appropriate description. I suggest "coordination".
- 7.0 Tasks #25 -28 have not occurred.
- 7.2 Position responsibilities have not changed in the past two years.
- 8.2 Human Resources management skills are not required.
- 8.2 Fundraising strategies are no longer required as it was determined several years ago that this effort was not an efficient use of staff time.
- 8.2 Volunteers and performers are not paid; they receive a small snack stipend, a shift stipend set by policy determined by the Supervisor to help fill certain shifts with low demand, and are reimbursed for mileage according to existing policy.
- 12.0 The performance arts and survey programs have not matured to their full potential. Again, policies are set at the supervisor or manager level, and, as far as I know, these programs did not exist in its current format previously.

Bruce

Department Manager Additional Comments – Lakita Spencer Desk Audit

Background:

The volunteers donate their time to answer questions and provide information about local businesses predominately to non-resident arriving passengers at Oakland International Airport. According to information collected by the volunteers over the span of several years, over 70% of these questions involve the options for and the location of ground transportation from the airport. (i.e. "Where do I catch BART", "Where is curb 2E to catch Uber".)

The vast majority of volunteers donate between 3 and 5 hours weekly. There is a small number that donate more than that.

While we refer to airport patrons as "customers" it is important to point out that the actual custom on a transactional basis is between the airport patron and our tenant airlines and concessionaires. All of these tenant companies have employees working to provide information, as well as execute actual customer transactions and sales. We are very grateful to have the volunteers willing to augment the efforts of our tenants and provide information to the traveling public.

In the past nine years most travelers have adopted the use of hand held electronic devices allowing for them to search for information on their own. As a result, there are less questions asked at the volunteer booth. Additionally, it has been more difficult to get volunteers to donate time. To add rigor to the shrinking program, we added two subsets of volunteers. They are the survey takers and musical performers or "buskers". The Supervisor manages the development and execution of the new subsets and has assigned operational tasks to the Assistant.

Over the years, the number of volunteers has decreased from a peak of 85 to the current level in the mid-60 range including the Survey Takers and Buskers.

I have reviewed Mr. Kidd's "additional comments" document and concur with all of the exceptions he points out.

I add the following:

2.4 – The budget for the volunteer program is developed by the Supervisor and Manager as a line item in the overall department budget. It is then approved by the Aviation Director, Executive Director and Board of Port Commissioners.

2.6 – The Assistant Aviation Marketing Associate does not manage a workforce.



John Albrecht

Department Manager

EXHIBIT F

Lakita Spencer- Priorities through December 2017

Task	Completion Date/ Frequency
1. Increase volunteer roster to 60+ a. Update and make available current roster with pertinent information for each volunteer, including term renewal/end date	Real-time
2. Maintain, track and demonstrate 85% coverage of shifts, 8AM- midnight, both booths	Monthly
3. Schedule survey collection per plan	Quarterly
a. Track shifts conducted by day and time of day	
b. Meet quotas for completed surveys	
4. Provide final recommendation and get approval for uniform purchase; order, replace, and outfit volunteers	12/15
5. Badge and schedule two performers in post-security a. consider and implement any branding needed	11/15
6. Evaluate current performers for quality and adherence to policies, and dismiss as needed	10/31
a. Evaluate branding and/or sign needs and implement with supervisor's approval	
7. In conjunction with other department members and outside videographers, create and implement online customer service training video, after approved by Director of Aviation in September	10/31
8. Update volunteer handbook and review key policies with volunteers	9/29
9. Compile set of questions and observations entered by volunteers into database and submit to supervisor	Quarterly
10. Evaluate and track volunteers for proficiency in answering ten core questions; report out	12/15
11. Schedule at least four volunteer meetings through 2018	9/1

→ Identify core items/hierarchy

1 *Appeal of Classification Study by Port of Oakland Employee Lakita Spencer*

2 **PROOF OF SERVICE**
3 [C.C.P. §1013, F.R.C.P. Rule 5]

4 I, the undersigned, state:

5 I am a citizen of the United States. My business address is 530 Water Street, Oakland, CA.
6 I am employed in the County of Alameda. I am over the age of eighteen years and not a party to
7 this action. On the date set forth below, I served the foregoing documents described as follows:

8 **APPEAL OF CLASSIFICATION STUDY BY PORT OF OAKLAND**
9 **EMPLOYEE LAKITA SPENCER**

10 on the following person(s) in this action by placing a true copy thereof enclosed in a sealed envelope
11 addressed as follows:

12 Civil Service Board
13 City of Oakland
14 150 Frank Ogawa Plaza, 2nd Floor
15 Oakland, CA 94612

16 [X] BY FIRST CLASS MAIL – I am readily familiar with my firm’s practice for collection and
17 processing of correspondence for mailing with the United States Postal Service, to wit, that
18 correspondence will be deposited with the United States Postal Service this same day in the
19 ordinary course of business. I sealed said envelope and placed it for collection and mailing
20 this date, following ordinary business practices.

21 [] BY PERSONAL SERVICE – Following ordinary business practices, I caused to be served,
22 by hand delivery, such envelope(s) by hand this date to the offices of the addressee(s).

23 [] BY OVERNIGHT MAIL – I caused such envelope to be delivered by a commercial carrier
24 service for overnight delivery to the office(s) of the addressee(s).

25 [X] BY EMAIL – I caused said document to be transmitted by email the address(es) noted below:
26 TPulliam@Oakland.net

27 I declare under penalty of perjury under the laws of the State of California that the foregoing
28 is true and correct and that this declaration was executed this date in San Francisco, California.

Dated: March 1, 2018



KULWINDER KAUR

Classification Appeal & Transfer Request



Lakita Spencer

Port of Oakland

Oakland International Airport

3/1/2018

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Summary

Pursuant to Personnel Rule 3.04(e) a hearing by the Civil Service Board has been requested to appeal the Draft Final Classification Study Report completed by Koff & Associates. My initial submission date was March 30, 2017. The Classification Study Report date of completion is unknown as the document does not identify this information. I also was not provided any personal notification or signed, original copy despite several requests. After obtaining legal representation I was provided a copy of my classification study from my attorney H. Larry Elam III. The Port's legal representative Thomas Richards with Richard Thorson Graves & Royer certified the copy provided to my attorney is the final.

In addition to Personnel Rule 3.04(e), I would like to request a ruling on my behalf for the Port's failure to comply with Sections 5.07, 5.08 [REDACTED] in the Civil Service Rules and Procedures which allows for the reassignment and/or transfer of an Port employee. Instead of complying with the Civil Service Rules the Port has conditioned my transfer from Aviation Marketing to Terminal Services on me signing a settlement agreement that waives my rights to pursue civil actions stemming from my employment with the Port.

After reviewing the Classification Study Report I received from my attorney on November 17, 2017, I identified a substantial amount of misreported information, provided by John Albrecht, Brian Kidd and Koff & Associates.

In addition, because of filing several grievances against John Albrecht and Brian Kidd for harassment, disparate treatment, hostile work environment, retaliation and alleging claims of unlawful employment practices by my employer, the Port of Oakland, it is my belief that my classification (advancement) was denied and my transfer has been deliberately withheld despite the Port's knowledge of the Civil Service Rules and Procedures.

Growth and demand on Visitor Information Services Program at Oakland International Airport (OAK)

Annually, my volunteer team donates over 13,500 hours and assists over a half million customers. Increased air service has led to a 40% service increase since I started this position in 2007. In response to increased passenger traffic and demands, both information centers have been renovated and expanded to accommodate the growing number of passengers requiring our assistance with travel planning and airport way finding. Our volunteers serve as a personal concierge to OAK's customers.

OAK is served by 13 different airlines, 7 are exclusive to OAK in the Bay Area.

OAK has had 48 months of consecutive growth. In 2017, we served over 13 million passengers and in 2016 we served 12.1 million passengers. In November 2017, Norwegian Airlines, one of OAK's largest international operators, passenger loads increased by 40%. This continual growth has caused increased traffic to our information centers in Terminal 1 and 2 and increased demand on the volunteers that staff the information centers.

In preparation for both international air service carriers Volaris & Norwegian, I developed ground transportation brochures and training materials on Norwegian and Swedish Culture & Etiquette which worked to support language barriers and passenger retention goals.

My volunteer team has also supported countless inaugural and launch events supporting with guest registration, escorting elected officials, wayfinding, tours and other event functions.

Provided below is an overview of the international air service growth that has occurred at Oakland since 2009. Also included, are new air service routes commencing in 2018.

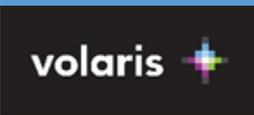
Airline	Destination(s)	Launch Date
	Puerto Vallarta	February 2017
	Los Cabos	February 2017
	Newark/New York City	June 2017
	San Antonio Indianapolis/Minneapolis-St. Paul	July 2018
	Stockholm, Sweden	May 2014
	Oslo, Norway	May 2014
	Copenhagen, Denmark	March 2017
	London, (Gatwick)	March 2017
	Rome, Italy	February 2018
	Paris	April 2018
	León	August 2014
	Morelia	August 2014
	Guadalajara	July 2009
	Mexico City	July 2009
	Barcelona, Spain	June 2017
	London (Gatwick)	March 2017
	Terceira	April 2013
	Lihue	April 2018
	Dallas-Fort Worth	April 2018

Table 1: New Domestic & International Air Service (2013-Current)

Airport Practices, Customer Experience and Volunteer Program Management

In the aviation industry volunteer staffing teams are recognized as an integral part to airports ability to provide customer service.

Having a strong volunteer program directly contributes to management strategies for enhancing the customer experience subsequently helping passengers feel more at ease and relaxed, which translates to repeat business, higher spending rates at our concessions, and ultimately greater net revenues to the airport.

As a volunteer program manager, it is my job to stay abreast of strategies that will assist me with training my team on how to provide a unique airport experience for our customers. My team also directly impacts OAK's ability to have a competitive edge, as we are located within a region where fliers can choose between multiple airports (San Francisco, San Jose and Sacramento).

I spend a significant amount of time building strategic partnerships with national and regional organizations, district associations such as ACI-North America, Visit Oakland, City of Oakland Business Development Office, Visit Berkeley, Tri-Valley, BART, AMTRAK, AC Transit and many more.

These strategic partnerships help my volunteer staff team provide airport customers with information about the entire San Francisco Bay Area region. Similar strategic partnership has been established with local hotel and ground transportation providers. These relationships help us assist customers with a myriad of traveling needs. For example: customers with unexpected delays, missed flights or individual who need wheel chair assistance etc.

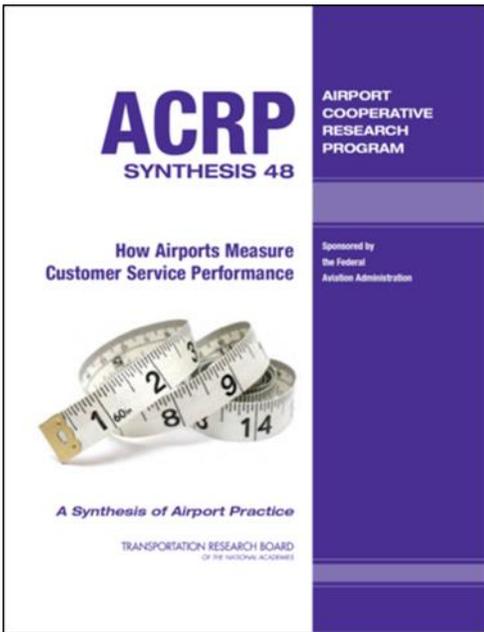
It is also relevant to note that events like 9/11 vastly impacted the airport operations in the following ways:

- Significant industry changes have created more responsibility for front line teams.
- Oakland Airport faced various budget crises and reductions in staff; we are doing more with less.
- Airlines are outsourcing work and have a smaller number of employees to assist customers.
- Security changes have caused increased delays at security check points.
- Increased customer inquiries prior to arrival at our facility.
- Increased number of international travelers who arrive 6- 8 hours prior to their flight, that have more complex needs related to international travel (examples: luggage storage, limited pre-security food options, currency exchange, technological deficits etc.).



Figure 1:Terminal 1 Security Checkpoint





As stated in a published Airport Cooperative Research Program Synthesis Report published in 2013 “In the last decade, economic upheaval, new security protocols, airline mergers and bankruptcies, and adoption of mobile technology have permanently altered the operating environment at airports.”

The passenger experience is defined by four distinct segments:

1. Getting to the airport
2. Waiting in the Terminal before security
3. Passing through security check points
4. Finding the gate.

The volunteer team I manage influences three of the four distinct segments that directly impact the passengers experience. They serve as the front-line customer service team and are typically the first point of contact for arriving and departing customers. The volunteers also represent and expose customers to OAK’s core service values. Kindness, Community & Integrity.

Below is a summary of the key customer service inquiries we receive from OAK passengers.

Pre-Arrival to the Airport	Waiting in the Terminal Pre-Security	Post-Security & Terminal Services
<ul style="list-style-type: none"> •Phone inquiries about TSA prohibited items* •Personal Identification requirements * •International flights schedules* •Trip planning assistance (Car Rentals, Door to Door Shuttles, BART operation hours, Scheduled Transit Providers) •Park and Call Lot •Security Wait times and suggested arrival times 	<ul style="list-style-type: none"> •stamps •printing/business center services •currency exchange •luggage wrap* •wheel chair assistance •lost luggage •luggage storage* •pre-security concessions •Booking flights •USO requests •Ticket Counter hours •TSA Pre-check* •Code Share flights: Virgin America, Iberia, etc. * 	<ul style="list-style-type: none"> •FIDS location •Food locations near gates •Lactation stations •Pet Relief Areas •Airline gate assignments •Directing to other terminal* •Local SIM cards purchase locations * •Escape Lounge Access information requests*

Table 2: Passenger Inquiries

*Items that are related to increased international air service or elevated security regulations.

Distinguishing Characteristics:

My essential job functions fit within a volunteer management role and in terminal services. My job responsibilities are in line with human resource functions since I manage and oversee a key-and complex organizational resource. In my position I am primarily responsible for analyzing what expertise is needed to achieve the business and/or strategic goals of the Port of Oakland & Oakland International Airport as it relates to enhanced customer experiences.

The volunteer team I manage operates as OAK's front line and serves the customer first point of contact upon arrival or departure from Oakland International Airport.

Staffing and supervision are two of the most critical functions of my position. Although the Port asserts that I do not lead or supervise it is my sole responsibility to oversee the progress and productivity of my team. I am the direct point of contact for the Volunteer Program and Performance Arts Program at OAK. I have operated in this capacity for the Volunteer Program since I was initially hired in April 2007 and the Performance Arts Program since 2013.

Essential functions: Managing Human Resources

- Development of hiring and termination policies. I redesigned the volunteer application, designed the existing Pre- interview questionnaire, interview rating systems, termination practices. (See Exhibit C)
- Recruitment (development of materials, website content, ads placed in local newspaper and on social media sites)
- Screening volunteer candidates (interviewing, skill assessments, etc.)
- Onboarding new volunteers (orientation, training and scheduling) this process includes meeting IRS reporting requirements and ensuring volunteers meet Federal Aviation Administration (FAA) security guidelines.
- Staffing analysis and attendance monitoring (establish and enforce shift coverage and compliance with program participation policies)

Supervisory functions:

- Monitoring progress and productivity which includes adherence to volunteer performance expectations.
- Mutually setting goals with volunteers in regarding enhancement, customer service, core values and/or shift coverage.
- Volunteer Retention (Supporting conditions for their motivation).
- Observing performance and giving feedback; Addressing performance problems
- Recognizing common risks and liabilities (ensuring volunteers act ethically).
- Conducting performance reviews (One on One's)
- Ensuring sufficient recognition rewards (Example: Appreciation Events, Service Awards etc.).
- Volunteer Terminations: [REDACTED]

Scope of Responsibility

My classification is responsible for providing airport information and guest services support for a growing international airport facility. *It should be noted that my classification has not been reviewed since 1996*, which is prior to 9/11, raised security conditions and before the addition of several international carriers, all significant events that have impacted the passenger experience and airport management practices and increased the scope of my work responsibilities. The role of information centers has evolved and the customer experience at OAK now includes two additional program areas.

The Performance Arts Program and Survey Ambassador Program were not initially included in my classification and was previously executed by two staff members in a higher classification.

Both functions require a higher level of skills due to the complexity of my volunteer management role. For example, Oakland Airport now has (6) international carriers that serve (13) destinations. The service and training level required by volunteers has become more complex as the needs of the customer have changed. Also increased security threats, have changed the climate to which volunteers must receive training ensuring we maintain compliance with Airport security regulations.

1. Number of Volunteers/Program Complexity

- a. I manage over 50+ volunteers, which does not include the Performance Arts Program performers.
 - i. Number of volunteers and contributed service hours (**13,500**) is equivalent to 7 full time employees.
 - ii. Manage online volunteer shift assignment scheduling program Volgistics, timesheets, personnel updates and volunteer announcements.
 - iii. Maintain Personnel records for volunteers and performers.
 - iv. Reimbursements are based on volunteer shift fulfillment. Volunteers receive mileage to and from the airport for each four-hour shift worked and various shift premiums based on special assignments, late night shifts or survey completion. Performers also receive stipend payments and have the ability to receive tips from customers.
 - v. Volunteers in all three programs are compensated by stipends in excess of \$500.00 a year and receive a 1099 from Port of Oakland. OAK volunteers receive this stipend based on the number of volunteer shifts per month and hours worked by each volunteer which are in four-hour increments. Additional compensation is given if additional time above the required minimum is spent on shifts over an excess of two hours. Volunteers are also given a \$50.00 gift card annually for recognition of services performed.

According to the Department of Labor and the IRS stipends or cash gifts of any amount (event allowable “nominal” stipends to bona fide volunteers) are generally taxable income. By this definition “volunteers” who receive anything of value exceeding \$500 a year, must be treated as paid staff or as an independent contractor and relinquish important liability protection under the federal Volunteer Protection Act (as well as become potentially liable, in the case of independent contractor classification, for self-employment taxes). See more at:

<http://www.forpurposelaw.com/appreciating-volunteers/#sthash.8Zalgt5u.dpuf>

Performing arts at OAK



Oakland International Airport (OAK) routinely presents local musicians playing classical, folk, rock, blues and jazz at Terminal 2 near the baggage claim as part of the OAK Performing Arts Program. Pictured above is The KeyBass Trio, one of the jazz groups that performs at OAK.

Figure 2: Currents Summer Edition

2017 1099-Misc to Volunteers

Recipient's name line 1	Recipient's city	Recipient's zip code	Recipient's account #	Other income
Alejandro Villanueva Aldaz				7,533.00
Brenda King				662.40
Charlie Geha				1,463.55
Cheryal Kidd				2,795.00
Elizabeth Moore				1,614.80
Gayle Deon Christian-Daniels				3,520.40
Genet Gebreamlak				2,239.55
Gordon Johnson				5,149.75
Jacqueline F Scott				3,598.50
James A Lutsch				931.20
Janett S McCoy				2,261.20
Joan Petersen				662.40
Josefina Mejia				745.80
Joyce A Reddick				682.50
Karen G Foster				2,613.00
Maria Cecilia Franco Lorenzana				4,088.15
Patricia V Bullard				3,797.25
Roy Hargrove				2,279.25
Susan P Larson				787.00
Sylvia D Phillips				4,086.80
Tariq El-Amin				863.15
Thelma Conner-James				1,682.70
Victor Avila Jr				775.50
Victorino Franco				7,815.60
William S Cooper				1,386.00
Total				<u>64,034.45</u>

Table 3: 1099 Misc. Verification

2. Budgetary

- a. I am responsible for administration of volunteer stipend reimbursements quarterly for mileages, meals and shift premiums. Surveyors also receive a paid shift premium that is issued quarterly. Included in our budget are costs for uniforms, supplies, survey gift incentives, survey & volunteer management software subscriptions, recognition awards etc. Due to the customer satisfaction survey program being billed to the previous customer service budget line item I frequently look for cost saving opportunities. Scheduling is also done based on budget availability. Due to the number of hours most volunteers work in program they are issued 1099's each year. The total program budget for the Volunteer Program \$90,000 and Customer Service programs which covers the Survey and Performance Arts program is \$7,500.00. In previous years before the program was managed by John Albrecht, the customer service budget was \$50,000. Within his first two years he cut over \$50,000 from my two program areas. Account codes associated to these items are [REDACTED] and [REDACTED]
- b. I make budgetary recommendations on possible revenue generating or cost savings opportunities for my program areas and the Aviation Marketing Department. I process monthly and contract payments ensuring items are allocated to the correct budget codes. I review monthly expenditure reports issued by finance and run supplier history and accounts payable inquiry reports as necessary for my program and management as needed since Aviation Marketing no longer has an administrative classification.

3. Special Performances

- a. General duties included specialized recruitment, audition scheduling, policy review, adherence and updates.
- b. Requires coordination with partners, stakeholders and outside agencies which necessitates additional security vetting to provide access to the sterile area past the security checkpoint.
- c. Additional coordination includes cross departmental coordination to distribute Airport Bulletins to correspond with stakeholders, secure parking passes/validation, and obtain Airport Operations support with vetting performers after core business hours since the program operates from 11 am to 11 pm daily.



Figure 3: MT. Eden High School Choir

4. Miscellaneous Work Responsibilities: Task Force & Customer Service Projects

- a. Passenger Experience Task Force
- b. Norwegian Passenger Retention Task Force
- c. Customer Service Video Projects
- d. Welcome to Oakland Signage

Currently my position classification states “The work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility.” These characteristics defined above are what distinguishes my position from the other levels within the Marketing series, the Aviation Associate Marketing & Commercial Representative classification states that it supervises support staff. The same definition exists in the Senior Aviation Marketing & Communication position. I would affirm that based on the information submitted I do perform supervisory job functions and have lead responsibilities, also the volunteers are “support staff” based on the nature of the essential duties they perform.

In fact, the previous manager, Christopher Minner, advocated for the previous coordinator be reclassified through an internal auditing process, the decision was not appealed to Civil Service and the employee retired. Christopher Minner also appealed the decision to Human Resources stating that the position had been wrongly classification at its inception and the complexities of the duties warranted the position to be classified higher within the Marketing Rep. series. This brought into question whether the position was in fact a Marketing position at all. As an excuse for keeping the position within the Aviation Marketing Department the working title was changed to my current working title Airport Visitor Information Program Coordinator.

Initially, I was hired solely to coordinate the Visitor Information Program (VIP). However, over the past nine years the scope of responsibilities for managing the VIP program has significantly evolved, my work responsibilities have increased to managing three programs concurrently and assigned additional procurement responsibilities.

Education & Work Experience Credentials

Prior to working at the Port, I co-founded two nationally recognized non-profit organizations. Worked as a Renter's Right's Education Program Director managing a volunteer staffed hotline for resident's in the State of Oregon. Overall, I have 16+ year's combined work experiencing leading and managing volunteer programs.

I also have a combined total of 205 credit hours from Portland Community College, Portland State University and the University of Phoenix. My course concentration was in Marketing and Business Administration. I also double majored in Community Development and Ethnic studies and have completed courses in Vocational & Business Accounting, Public Speaking and Business Communications.

Currently I am working towards my Bachelor of Science with a concentration of Marketing. I have completed 73 of 120 credits towards my degree. My current GPA is 3.82.

My Professional Development includes completion of numerous professional & computer application trainings:

Port of Oakland

- Business Writing Skills
- Presenting with Poise
- Professional Excellence

Visit Oakland

- Claiming Your Spaces: A Guide to Google, Yelp, TripAdvisor, Review Sites & More!
- Digital Marketing Trends & Best Practices for Facebook & Instagram
- A Guide to Social Media Content Planning, Distribution, and Online Promotion

Skill Path Seminars

- Becoming a Customer Service Superstar
- How to Become a Better Communicator

Motiviam/Executrain Computer Application Trainings

- Microsoft Word 2016 Level 2
- Microsoft Excel 2016 Levels 2&3
- Microsoft PowerPoint 2016 Levels 2&3
- Access 203- Queries, Forms and Reports
- Microsoft Excel 101-Introduction to worksheets, formulas, and worksheets
- Microsoft Excel 102-Formulas, functions & more

Recommendation prior to Hire at the Port of Oakland

October 6, 2006

Dear Sir or Madam:

It is my pleasure to write this letter on behalf of Lakita Logan who has served as Acting Visitor Information Program Manager at Oakland International Airport (OAK) as a temporary employee during the last five months.

Ms. Logan's job performance has been outstanding, and she has proven herself, an intelligent, organized, and hardworking leader. She has treated her assignment with superb professionalism, respect and responsibility.

During her time leading the Program, Lakita administered the entire record keeping, payroll, and scheduling functions for her staff of 100 part-time employees. She managed the construction and occupation of new booth facilities. Perhaps most importantly, she provided essential leadership and oversight for her team which is responsible for providing visitor information services to the 14.5 million passengers who visit OAK each year.

I have received numerous written and verbal compliments of Lakita's work. She has shown she is dedicated to her job responsibilities. She arrives each morning before schedule, has developed a great rapport with the staff involved in our program, and has impressed the entire Airport team with her enthusiasm, self-motivation, and talent.

Lakita proved to me from day one that she has ability, drive, and the invaluable capacity to immediately make significant contributions to any team. Regardless of exemplary performance, the Port of Oakland's charter limits the number of days in a year that a person may serve in a temporary capacity. Sadly, Lakita has reached that point.

Sincerely,

Christopher D. Minner,
Manager, Aviation Marketing and Communications

Authenticity verification

Chris Minner's Current Contact information:

Executive Vice President of Marketing and Communications at Tampa International Airport

Email: [REDACTED]

<http://southtampamagazine.com/top-10-under-40-chris-minner/>

Benchmarking OAK's Volunteer Program

Below is the correspondence I received from my previous, manager Christopher Minner, regarding the development of Tampa International Airport's volunteer program.

{Email Insert :}

I'm at TPA, and we're in the process of developing a brand-new volunteer program for the airport. We'd like to benchmark your program at OAK to make sure we have thought through all of the program manuals, processes, and procedures that we need to have in place before we launch the program this summer.

I have a special request – could you please send me a copy all the materials that you use to administer your program? I'd be looking for a copy of your volunteer handbook, any recruiting materials/brochures, any policies, procedures, or reports that you've developed for the program, timesheets, tally sheets, and anything else you can think of that would help my team develop this new program from scratch.



Figure 4: Roving Ambassador Jim Lutsch

A digital copy would be great. If you've got a hard copy of the handbook that you can share, I'd be glad to send you my FedEx number.

Once my team has had a chance to look at the materials, if you would be available, it would be helpful if we could schedule a brief phone call to pick your brain on any other outstanding issues.

If you have any questions, please give me a call – [REDACTED]

Very best regards,
Chris

I frequently receive inquiries from other airports who are interested in processes I have designed for OAK's volunteer program.

Performance Evaluation Comments prior to John Albrecht & Brian Kidd

Communications **3.80** *Exceeds expectations*

Effectively and clearly presents and expresses information, facts or concepts orally and/or in writing. Information-sharing is one of the Port's Seven Attributes.

Weight: 17%

Expresses ideas and thoughts verbally	3	<i>Meets expectations</i>
Expresses ideas and thoughts in written form	3	<i>Meets expectations</i>
Exhibits good listening and comprehension	5	<i>Outstanding</i>
Keeps others adequately informed	4	<i>Exceeds expectations</i>
Selects and uses appropriate communication methods	4	<i>Exceeds expectations</i>

Lakita is an active and perceptive listener who easily grasps complex information. She makes special efforts to ensure that others are kept informed. Her methods of communication are well chosen. She communicates clearly when speaking and she produces acceptable written materials.

Int./Ext. Customer Relations **4.40** *Exceeds expectations*

Interacts effectively with external customers and/or internal users of the Port's services. Identifies, acquires and maintains customer relations; provides prompt and courteous service. Customer Focus is one of the Port's Seven Attributes.

Weight: 16%

Displays courtesy and sensitivity	5	<i>Outstanding</i>
Manages difficult or emotional customer situations	5	<i>Outstanding</i>
Meets commitments	4	<i>Exceeds expectations</i>
Responds promptly to customer needs	4	<i>Exceeds expectations</i>
Solicits customer feedback to improve service	4	<i>Exceeds expectations</i>

Lakita treats all customers with exceptional sensitivity, courtesy, and respect. When dealing with emotional or difficult customers, she consistently achieves successful results. She increases customer satisfaction by consistently meeting commitments. Lakita responds quickly and willingly to the needs of customers. She enhances service delivery by soliciting customer input.

Teamwork **3.40** *Meets expectations*

Develops rapport and trust; is a team player. Teamwork is one of the Port's Seven Attributes.

Weight: 16%

Balances team and individual responsibilities	3	<i>Meets expectations</i>
Exhibits objectivity and openness to others' views	3	<i>Meets expectations</i>
Gives and welcomes feedback	4	<i>Exceeds expectations</i>
Contributes to building a positive team spirit	4	<i>Exceeds expectations</i>
Puts success of team above own interests	3	<i>Meets expectations</i>

Lakita asks for constructive criticism and offers helpful feedback to others. She makes a valuable contribution to team spirit. She fulfills her individual commitments while also meeting her team responsibilities. Lakita is able to openly and objectively consider viewpoints that differ from her own. She usually puts the team's interests above her own.

Planning and Organization **3.33** *Meets expectations*

Anticipates needs, forecasts results, analyzes and arranges work processes. Establishes priorities and sets goals.

Weight: 17%

Prioritizes and plans work activities	3	<i>Meets expectations</i>
Uses time efficiently	3	<i>Meets expectations</i>
Plans for additional resources	3	<i>Meets expectations</i>
Integrates changes smoothly	3	<i>Meets expectations</i>
Sets goals and objectives	4	<i>Exceeds expectations</i>
Works in an organized manner	4	<i>Exceeds expectations</i>

Lakita makes goal setting an integral part of planning her work and she displays strong organizational ability. She plans her work and establishes appropriate priorities. Lakita makes efficient use of her time. When making plans, she anticipates the need for extra resources. If plans change unexpectedly, she is able to make the necessary adjustments.

Exhibit A: Special Events and Strategic Partnership Collaborations

I frequently work in partnership with the local visitor bureau's and public transportation agencies such as Visit Oakland, Berkeley and Tri-Valley, AC Transit, AMTRAK, BART etc. to ensure we have materials available for distribution at the information centers. I also collaborate with Certified Folder Display to stock information centers and secure other local materials that can benefit customers traveling to and from Oakland & SF Bay area attractions.

Special Event Support (Airport-Wide)	Collaborative Event Support (Strategic Partnerships)
Alaska Airlines: MT Eden Choir Gate Performances	Oaktown Jazz Workshops
Norwegian "Red Carpet" Events	National Convention of Black Meeting Planners (Visit Oakland)
International Arrivals Building Grand Opening	Super Bowl 50
90 th Anniversary and Open House	National Tourism Week (Visit Oakland)
Norwegian, British Airways & Level Inaugural Events	BART Oakland Airport Connector
Escape Lounge Grand Opening	Chinese Delegations
Alaska/Hawaiian Airlines: Aloha Monday	Caltrans

Table 4: Airport Wide Support & Collaborative Partnerships



90th Anniversary and Open House: Designed Event Program, coordinated guest registration team and musical performances.



Super Bowl 50: Logistics coordination, designed orientation materials and trained 100+ volunteers.

"I want to personally thank you for all your time and dedication you put towards Super Bowl 50. You all were an important piece of this historic event and we couldn't have done it without you! All the volunteers had nothing but great things to say about working at OAK."

Elle Kehoe, San Francisco Bay Area Super Bowl 50 Host Committee Manager of Volunteers



BART Oakland Airport Connector: Re-designed ground transportation webpages, trained volunteer team and supported inaugural events.

<http://www.oaklandairport.com/ground-transportation/bart-public-transportation/>



San Francisco-Oakland Bay Bridge Construction Project: Supported Caltrans public information office, assisted with outreach and training of volunteers to inform airport travelers about the various closures during each phase of the Bay Bridge construction project.

"We would like to take this opportunity to extend our special thanks to Oakland International Airport for your proactive support throughout the planning and execution of this project. In particular, your provision of several booths and more than 100 volunteers to provide information and outreach in the days leading up to and during the closure was critical to our success."

Tony Anziano, Toll Bridge Program Manager

<https://www.youtube.com/watch?v=GDUIYZKlknk>

Exhibit B: Volunteer Ambassador Feedback and Passenger Inquiry Evaluation

The below chart summarized shared observations and evaluation of services to be considered for terminal services improvements.

Issue	Specific Identified Areas	Reporting Mechanisms/Response
<p>Pre-Concessions Food Options</p>	<p>General: Concession concept that provides more food options that are reasonably priced.</p> <p>Hours of operation: Do not accommodate passengers with long wait times or late arrival flights like Volaris Airlines.</p> <p>Limited variety of coffee/espresso drinks that is good quality. We regularly receive feedback about the poor quality of coffee drinks at Training Grounds. Heinholds only has black coffee and the “espresso” machine has been broken for some time.</p> <p>Note: Airport Internal Customers (Staff, tenants, Volunteers, LEO) that would patronize pre-concessionaires if an option was available. This includes relocated employees now on the 2nd Floor.</p>	<p>Customer Feedback Database</p> <p>Examples include:</p> <ul style="list-style-type: none"> -Customers who exit the secured area before realizing there are limited options pre-security. -Passengers whose ground transportation does not leave for an extended period or who are meeting someone on a later arriving flight. <ul style="list-style-type: none"> - Departing/connecting passengers meeting non-flying friends or relatives. - Customers who are arriving very early for their departures, in particular for the international departures. Customers will arrive at 8:00am, for example, for a 6:00pm departure because they need to check-out of a hotel or due to transportation issues (including arriving on another airline to connect).
<p>Currency Exchange option</p>	<p>On average we get at 10 requests per shift. Currently our only option has been to send customers to Mechanics Bank which is in Berkeley.</p>	<p>Is there a machine service available?</p> <p>Do we have enough international flights to re-evaluate this option?</p> <p>Is it feasible to provide this information on the website to incoming passengers in advance?</p>
<p>Language Assistance</p>	<p>We have a high volume of Spanish and other language speakers who need assistance.</p> <p>The team frequently must request support from custodians or wheelchair assistants to help if they are available.</p> <p>We also get customer who are hearing/vision impaired and would</p>	

	benefit from having a language line option available.	
Signage	<p>Directing passengers to Norwegian. For Southwest specifically, provide updated signage so customers do not end up looking for bags in T1 (happens virtually every flight arriving T1).</p> <p>Customers frequently stand at carousel 2 waiting for bags when flying on Southwest.</p> <p>Ticketing: When airline check-in counters are closed have them consistently post when they will be open and a contact phone number.</p> <p>General signage: Bathrooms, gate locations, Rental Cars, Uber/Lyft/Taxis and BART.</p>	
Maps/Way Finding	<ul style="list-style-type: none"> -Lack of signage in other languages. -Updated maps posted throughout the airport (the framed paper maps). 	
Stamps	We receive frequently request for options to mail items and customers needing a stamp.	Is this something that can be included in new concessions proposal. Is vendor available?
Mailboxes	Customers only can mail items from Terminal 1. Several notifications about getting a mailbox outside of Terminal 2.	Can relationship with USPS be reestablished to evaluate the stamps and mailbox options?
Luggage Storage/ Luggage plastic wrapping	Most frequently requested by International passengers on Norwegian.	
Wheel Chairs Assistance	<p>-Unresponsive providers/Insufficient services available by APS for Norwegian customers.</p> <p>-Ground Transportation Providers: Our providers currently do not provide this option.</p>	<p>Quarterly Staff Meetings: This continues to be on ongoing issue and there is a lack of clarity around ADA services provided at OAK.</p> <p>Volunteers are faced with barriers in assisting customers and having adequate resources. (Language/Vision Tools included)</p>
Rental Car Center	Rental car companies advertising that they are "in terminal" confuse Passengers and they are unhappy when we tell them where they need to go.	

General Services Requested	<ul style="list-style-type: none"> -Local SIM cards for cell phones (benefits international travelers) - Clipper Cards - BART Senior & Child tickets 	
Escape Lounge Access	<p>General information about the lounge unavailable. (Example: rack card or brochure)</p>	<p>Customer Feedback Database General comments: Customers who want to use the Escape Lounge but can't get into the secured area. They may have pre-paid for access or have access through an airline or credit card program. Usually they can't get in because check-in for their flight is not open yet.</p>
Paging	<p>-Volume is too loud and customers cannot hear baggage and other important announcements.</p>	<p>Quarterly Staff Meetings/Customer Feedback Database</p>
Wi-Fi	<ul style="list-style-type: none"> - Customers using Uber/Lyft cannot get a Wi-Fi signal to request service. - Customers regularly experience connectivity issues. - Frequently must spend an extensive amount of time supporting customers with getting on the Boingo network. – The general Wi-Fi signal is weak near both information booths which is where customers are most likely to seek assistance. 	<p>Customer Feedback Database Customer Satisfaction Survey OAK Website Submissions</p> <p>-Connectivity issues well documented in Survey responses.</p>
Maintenance Requests	<ul style="list-style-type: none"> - Hotel/Motel Boards: Are frequently out of service. The branding is out of date on the screens and high dusting needs to be done. Another area were dust balls are falling on customers. - Rugs to enter airport: Identified as a safety hazard. - Water Fountains: Low water pressure, water not cold 	<p>Customer Feedback Database Quarterly Staff Meetings</p>

Table 5: Recurring Concerns & Observations from Volunteer Team

Exhibit C: Program Management Guide Processes

In 2010 & 2012 I conducted a program audit to document the management processes. I designed a Volunteer management guidebook to provide “nuts and bolts” information about how the Visitor Information Program Coordinator recruits, supervises and works with the program volunteers.

I also documented the items I designed for the volunteer program, which includes writing the position descriptions for the Volunteer Handbook, Website Recruitment and Orientation; Uniform Policies, Customer Service Core Value Standards and the Program Mission Statement. My supervisory processes are outlined below.

Orientating Volunteers

Make sure the volunteer(s) have enough information to become orientated to VIP policies and “way of doing business”. Give the volunteer a clear understanding of the program and methods they can use to succeed in their role as an OAK Volunteer. Ensure the volunteer receive the training they need to allow them to do their job adequately and safely.

The role of the supervisor

My role as the supervisor is to ensure the success of the Volunteer Program. I am responsible for fulfilling program commitments and meeting program expectations and goals. These items are key factors and are as important to the program coordinator as they are for the volunteer.

Supervisory areas I regularly evaluate:

- Am I taking adequate time to set up and maintain projects with the volunteer to assure a positive experience for the Airport and the Volunteers?
- Have I set clear goals and checked for understanding?
- What does the volunteer want from this job-what is his or her motivation?
- How can I recognize the volunteer for achievements?
- How can I best use the expertise this volunteer brings to the job?
- Am I constructive yet supportive with my feedback to the volunteer?
- How often do I “check-in” with the volunteer(s)?

Safety & Security Procedures for volunteers

Recording Keeping

Current records kept on file:

Volunteer application
Pre- Interview Questionnaire
Interview Rating Sheet
ID badge request
W-9 for supplier ID payment set-up
Training Log
Volunteer Codes of Conduct Agreement
Uniform policy acceptance
Correspondence

Customer Service Core Values:

The Oakland International Airport Volunteer Program was designed to provide a front-line customer service option for our customers, airline tenants and support the Port of Oakland's customer service values Kindness, Community and Integrity.

1. These values outline our path to providing great customer service.
2. All volunteers are required to become familiar with our customer service guidebook "Back to our roots"; this guide is used as a tool to provide volunteers valuable insight on how they can take our customer service to the next level.
3. On a regular basis, volunteers are encouraged to self-reflect about things they can do different or can keep doing to ensure they remain a leader in customer service. Included in this process is evaluation of the tools we provide through our ongoing training program.

Volunteer Types:

- **INFORMATION CENTER** –Meet and greet people and give directions to various services within the terminal. Provide handouts on ground transportation options and visitor information.
- **CUSTOMER SERVICE AMBASSADORS**- Meet and greet people and conduct customer satisfaction surveys within the terminal.
- **TUNES IN THE TERMINAL PERFORMERS**-Provide in terminal entertainment and contribute to enhance customer experience.

Hours of Operation:

The Oakland International Airport Visitor Information Center is staffed by volunteers, Monday through Sunday from 8am to 12am.

The Customer Service Ambassador Volunteers conduct in-terminal surveys Monday through Sunday from 6 am to 2 am.

The Tunes in the Terminal Performance hours are Monday through Sunday from 11 am to 11 pm.

Time Off/Leave Requests:

- **Leave of Absence:** Volunteers must submit all requests for a leave of absence in writing. Leave will be granted for no longer than 60 days. A volunteer who remains inactive for more than 60 days must reapply before returning.
- **Holidays:** Volunteers are not required to work on major holidays. Every effort should be found when needing minor and/or religious holiday coverage.
- **Vacations:** Notify Volunteer Coordinator of any vacations that are for an extended period of time.

Termination and Resignation of a Volunteer:

The volunteer codes of conduct states volunteer commitment with the Oakland International Airport Volunteer Program is at-will and may be terminated by the volunteer, volunteer program coordinator or the Oakland International Airport management at any time.

Introduction

Program Management Processes

- VIP Overview & Objectives
- Hiring & Selection Processes
 - Insert Badging Application
 - Pre-Interview Phone Questionnaire
 - Interview Questions & Formats
- Supervision & Evaluation
 - Insert Volunteer Performance Evaluation
- Volunteer Job Description

The Visitor Information Program Volunteer Handbook

- Volunteer Types
- VIP Training
- Program Contacts and General Information
- Program Benefits
- Volunteer Codes of Conduct/Agreement
- Volunteer Guidelines
- Attendance, Shift Assignments & Scheduling
- Dismissal/Resignation
- Dress Code & Appearance
- Food & Drinks
- VIP Staff Meetings
- Use of Port Equipment
- Customer Complaints/Unusual Situation Reporting
- ID Badging
- Badge Renewals
- Volunteer Parking Procedures
- Opening/Closing Procedures
- After Business Hours Procedures and Policies
- Tally Sheet Instructions
- Reimbursements
 - Reimbursement Rates
 - Reimbursement Processes

- On Shift Resources

Appendix

- Sample Login/Logout Cheat Sheet
- Sample Scheduling & Updates Protocol
- Sample Tally Sheet

Happy New Year!

It was great seeing everyone at the Volunteer Appreciation Event. I hope everyone enjoyed the festivities and learning about the new and innovation European customer service concept offered at OAK's Escape Lounge. Thank you again for your contribution to the Volunteer Program and our customers!



BART Fare Increase

- Effective January 1st BART implemented increased fares and added fees for using paper tickets.
- Updated Fares & Schedules Guides have not been provided by BART for public distribution at the Oakland Airport Station yet.
- Please make sure you review the updated Fare charts and Maps available at each information center.

Volunteer Reimbursements

Please review your service hours to ensure your records are accurate for the months October through December 2017. **Due to the holiday**, volunteers will have additional time to review their service records. **The deadline to request corrections is Friday, December 12th.**

To recap, for all volunteer positions roundtrip mileage is provided from your home to the airport.

- The maximum mileage rate is 45 miles roundtrip.
- For every four-hour shift volunteered, the Port will reimburse \$3.00 for refreshments.
- A \$3.00 premium will be provided for volunteer who work more than 6 hours a day preceding to 8p.m. (Example: If you work two morning shifts.)
- Reimbursements are done on a quarterly basis. Volunteers have five business days at the end of each quarter to review their service hours and request corrections.
- After the five day review period, reimbursements are processed and sent downtown to our Port Finance department for check issuance. Reimbursements can take up to four weeks to receive.



Reminder: Mailing Address

All items should be mailed to **One Airport Drive, Box 45 Oakland, CA 94621.**

Volunteer Feedback

I have compiled a formal summary of your feedback responses to share with our Senior Management team. I am also working to design a tool that ensures our team receive status updates on the identified items as areas for improvement.

Please continue when appropriate, to enter feedback in the database or by sending me an email.

The feedback you all provide is important to our ability to stay informed about operational improvements we can provide customers traveling through our facility.



I think it is important to always be asking the following question:

What can the Airport do in terms of customer service to ensure that customers choose OAK for their future air travel?

Scheduling & Attendance Reminder(s)

In reviewing this past quarter's shift coverage and schedule I continue to notice volunteers still on the schedule who are not present for their scheduled shift, without substitution or who are arriving more than 15 minutes up to 30 minutes after the start time of their scheduled shift. Please only schedule yourself for the shifts you are able to fulfill. Also, if you are going to be late please provide a courtesy call to me and/or volunteers on duty who you normally relief.

If you are taking vacation or require a leave of absence make sure your update the schedule. Refresher course on using Volgistics will be in February and will be offered throughout the year.

Also, it is important that volunteers check-in within the first 15 minutes of the shift to verify coverage if you are not working alone. If you do not have a copy of the volunteer roster please contact me for a copy.

Keep up the great work!



Exhibit E: Sample Survey Schedule & Quotas Summary (Years 2014-2017)

Although it is stated by Koff & Associates that this program had not yet reached its maturity. Prior to management's retaliatory actions, I successfully executed this program and several years of data was collected and shared with Senior Management for the purposes of setting customer service benchmarks for OAK.

Customer Survey Quotas- 2017													
Domestic										International			
Per Month										Per Month			
	Total	T1 Total	<10 AM	10-6PM	after 6 PM	T2 Total	<10 AM	10-6PM	after 6 PM	Total	Norwegian	BA	Volaris
Jan-17	300	100	40	40	20	200	60	100	40	120	60	0	60
Feb-17	300	100	40	40	20	200	60	100	40	120	60	0	60
Mar-17	300	100	40	40	20	200	60	100	40	120	60	0	60
Apr-17	300	100	40	40	20	200	60	100	40	300	100	100	100
May-17	300	100	40	40	20	200	60	100	40	300	100	100	100
Jun-17	300	100	40	40	20	200	60	100	40	300	100	100	100
Jul-17	300	100	40	40	20	200	60	100	40	300	100	100	100
Aug-17	300	100	40	40	20	200	60	100	40	300	100	100	100
Sep-17	300	100	40	40	20	200	60	100	40	300	100	100	100
Oct-17	300	100	40	40	20	200	60	100	40	260	100	100	60
Nov-17	300	100	40	40	20	200	60	100	40	180	60	60	60
Dec-17	300	100	40	40	20	200	60	100	40	220	60	60	100
Cost:													
Total Interviews											6420		
Total Shifts (20 interviews per shift)											321		
Stipend+ mileage											\$32		
Incentives											\$6,741		
Total Projected Costs											\$17,013		

Table 6: FY 17 Survey Quotas

Customer Survey's Accomplished To Date													
	Q4 Domestic	671				Int'l 2015	264			BART	661		
	Q3	814				Int'l 2014	432						
	Q2	357											
	Q1	429											
Total Survey's 2015		3196											
Customer Survey Quotas- 2016													
Per Month										International			
	Total	T1 Total	<10 AM	10-6PM	after 6 PM	T2 Total	<10 AM	10-6PM	after 6 PM		Norwegian	Volaris	
Jan-16	300	100	45	30	25	200	60	100	40				
Feb-16	300	100	45	30	25	200	60	100	40				
Mar-16	300	100	45	30	25	200	60	100	40				100
Apr-16	300	100	45	30	25	200	60	100	40		50		100
May-16	300	100	45	30	25	200	60	100	40		100		100
Jun-16	300	100	45	30	25	200	60	100	40		100		100
Jul-16	300	100	45	30	25	200	60	100	40		100		100
Aug-16	300	100	45	30	25	200	60	100	40		100		100
Sep-16	300	100	45	30	25	200	60	100	40		100		100
Oct-16	300	100	45	30	25	200	60	100	40		50		100
Nov-16	300	100	45	30	25	200	60	100	40				
Dec-16	300	100	45	30	25	200	60	100	40				

Table 7: Prior Year's Survey Quotas & Accomplishments

Exhibit F: Misrepresented information

Throughout the report submitted by Koff & Associates I observed various items that were misrepresented, inaccurate or completely omitted.

1. Volunteer management is not generally carried out at an entry level. The supervisory functions have increased annually to meet the day to day goals required to carry out the airport's mission and changing industry demands.

{Insert from Christopher Minner's rebuttal regarding my classification in February 2006.}

The position which [REDACTED] occupies is not "entry level". The job specification under which she was hired identified the position as "the entry journey level of the Aviation Commercial Rep series."

2. Falsified number of volunteers and performers. This number continues to increase as I continually conduct recruitment.
3. [REDACTED] volunteer members have resigned, and Aviation Marketing staff turnover has significantly increased. The Port is aware of these issues and [REDACTED]
[REDACTED] I managed 100+ volunteers consecutively prior to these events.
4. When I was hired as the permanent volunteer program coordinator in 2007 there were two information centers and a roving ambassador station located post-security at the Oakland International Airport.
5. I developed the volunteer position descriptions and update these documents as needed on the OAK website.
6. I manage and develop website content on the Become a Volunteer & OAK Busker page located on the OAK website.

<http://www.oaklandairport.com/jobs/volunteer/>

www.oaklandairport.com/contact/becoming-oak-busker/

7. Falsification of roles and misrepresentation of roles regarding the impact customer relations programs have on strategic operations on an airport-wide basis. Ms. Heaver (Aviation Associate Marketing & Communications Rep.) solely coordinated events during her six months of employment at the Port and Ms. Heaver's position does negotiate contracts as stated by Koff & Associates. I am very familiar with the roles of Ms. Heaver's position as I worked very closely with her predecessor Bola Aremu. In fact, Ms. Heaver resignation in December 2017 [REDACTED]
[REDACTED]

{Email Insert :}

Joanne Holloway's response when she read the classification report from Koff & Associates:

From: Joanne Holloway

Sent: Friday, November 17, 2017 9:19 AM

To: Lakita Spencer <lspencer@portoakland.com>

Subject: RE: Lakita Spencer Koff Associates Desk Audit Report.pdf

Ms. Spencer's responsibilities are not captured in this classification. She does assist with tours to OAK, some of the special events, does the procurement and accounting support piece behind what is needed for special events, but otherwise does not have assignments that relate to the Associate classification.

Neither are mine or Crystal's!! Nobody does that stuff as it's outlined in our job descriptions! [REDACTED]

Another noteworthy item falsified is the statement that the Oakland International Airport has a consumer affairs division. I have worked collaboratively and served as a backup for Ms. Holloway (Aviation Associate Marketing & Communications Rep.) throughout the past 10 years and no such division exists. Ms. Holloway was responsible for overseeing our Advertising program, managing advertising contracts, responding to customer complaints, contract procurement, and other assigned duties. Many of the items listed in my classification study as reasons Ms. Holloway's position had a higher strategic impact were the same items she was denied acknowledgement for in her requested desk audit in 2013. The overview of this grievance item is detailed in Exhibit G.

Also, the listed Aviation Senior Marketing and Commercial Representative position is no longer apart of the classification series. Due to personnel grievances, this position was reclassified, removed from Aviation Marketing and assigned to our Aviation Executive Office. The employee in this reclassified/reassigned position is Keonnis Taylor. The communications function has been removed from Aviation Marketing and Aviation Communications was created. Effective October 29, 2017 the Director of Aviation added a Management Analyst Assistant position to support Keonnis Taylor.

Prior to Keonnis Taylor, this position was filled by two additional staff members who resigned within 6 months. For 8 years the position was held by Rosemary Barnes and she advocated for the Aviation Marketing Manager, John Albrecht to have the position upgraded to the Senior Marketing and Commercial Representative position. John Albrecht refused to support her desk audit. After Ms. Barnes resigned [REDACTED], John immediately upgraded the position.

8. Misrepresentation of the functions of my position into comparison of Ms. Heaver's and Ms. Holloway. My position function is autonomous and independent in nature since my position requires I identify how I carry out my assignments from inception to implementation. My position does not operate as an assistant to any staff member in the Aviation Marketing Department nor does my position have Marketing responsibilities. I presented this information to the Director of Aviation and Port Attorney in August 2017 which prompted the Port's initial offer to transfer me to Terminal Services as is was determined my work responsibilities would be more strategically in line with this department.

I autonomously manage the aspects of my position and program management processes required including but not limited to designing publications, volunteer newsletters, trainings, orientations and promotional incentives. Due to egregious conduct by John Albrecht and Brian Kidd various items regarding my position responsibilities were misrepresented and identified as me "overstating" my responsibilities.

John Albrecht has not managed my position for over (5) years and Brian Kidd's position was created to serve as an intermediary for Ms. Holloway and myself after numerous grievances being filed [REDACTED]

[REDACTED] I do not have daily contact with Brian Kidd as stated in Koff & Associates report [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED] John and Brian frequently add additional work outside our classifications

and when we make requests to have our positions evaluated for working out of class, we are harassed and retaliated against. Our work is then temporarily outsourced to consultants and temporary employees during the investigation and evaluation periods as if we had not been responsible for the duties outside of our classification for consecutive years.

Since filing my desk audit, I have experienced a number of retaliatory actions by John Albrecht and Brian Kidd in the form of changing or removing my work assignments, removing my ability to correspond with my team, etc.

9. Misrepresentation regarding cancellation of one on one meetings. Due to ongoing grievances [REDACTED] [REDACTED]) who were only met with behind closed doors I requested for these meetings to be cancelled.

During these meetings I received no support from Brian Kidd in obtaining required budgetary approvals to complete work plan items. The meetings were unproductive, and Mr. Kidd frequently used my one on one's as venting sessions to express his dissatisfaction with the actions of Aviation Marketing Manager John Albrecht. All these items are included in the grievance filed by my union on my and Ms. Holloway's behalf on March 20, 2017.

Exhibit G: Reported personnel rules and Civil Service Violations

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

- Worked as a temp simultaneously with [REDACTED] in the same classification which constitutes a violation of Civil Service Rules.
- Allowed to procure Good & Services without proper hosting authorization, a direct violation of Port policy. One vendor's outstanding balance was more than \$11,000 with invoices dating back to March 2017 when grievance hearing was held on August 10, 2017.
- Allowed three weeks to train new staff [REDACTED]. I was given three part-time days after an extended medical leave of a year.

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

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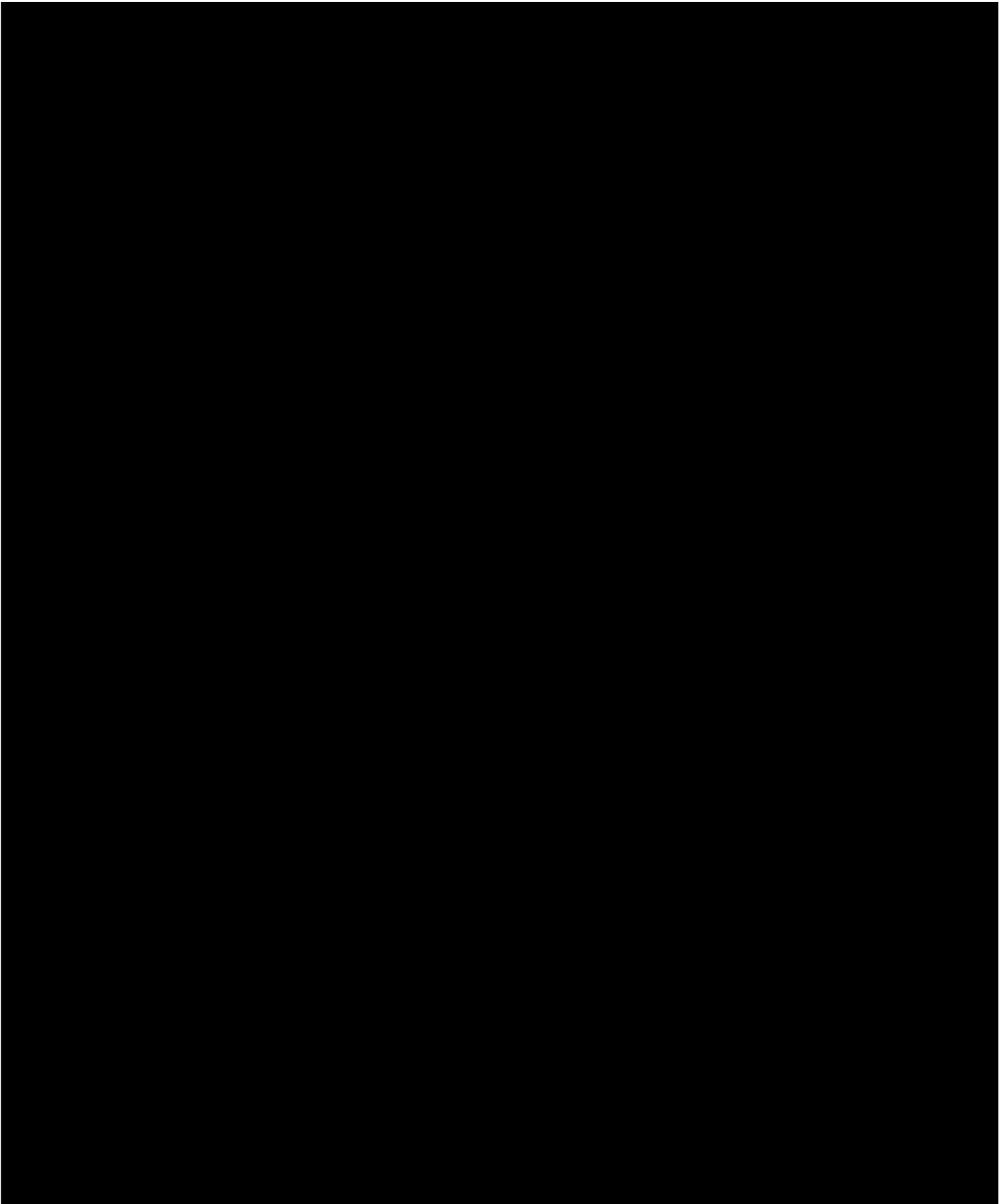
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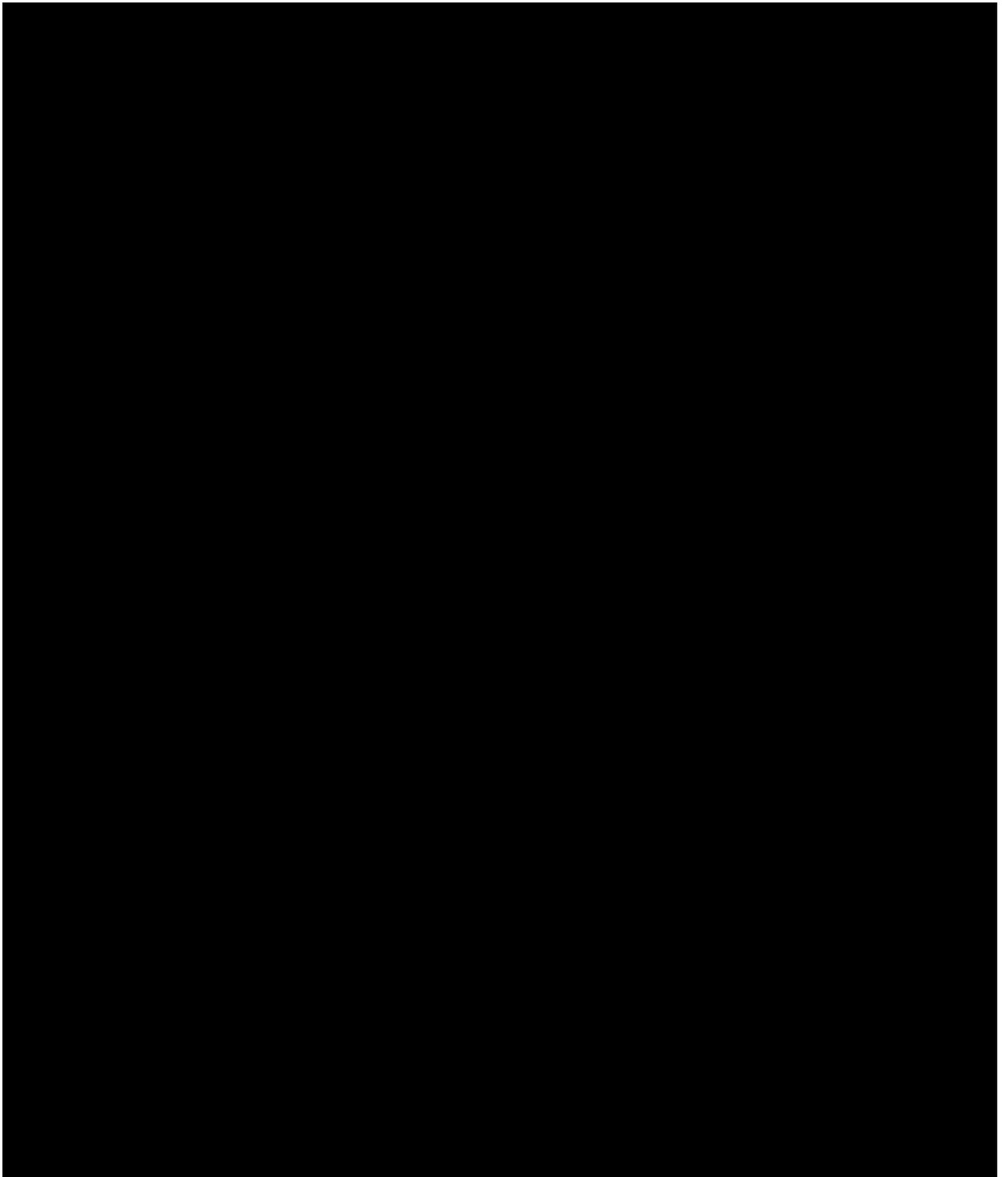
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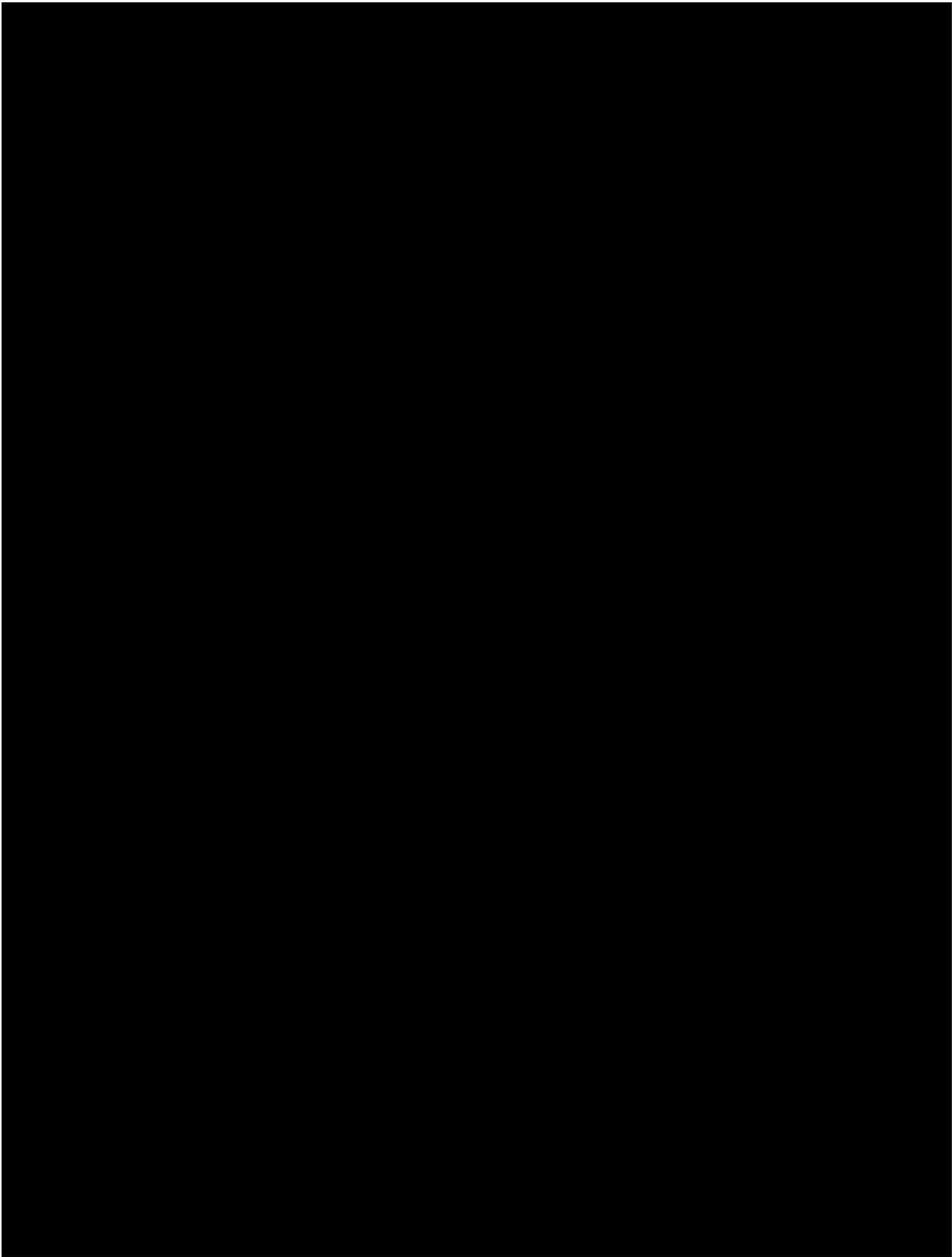
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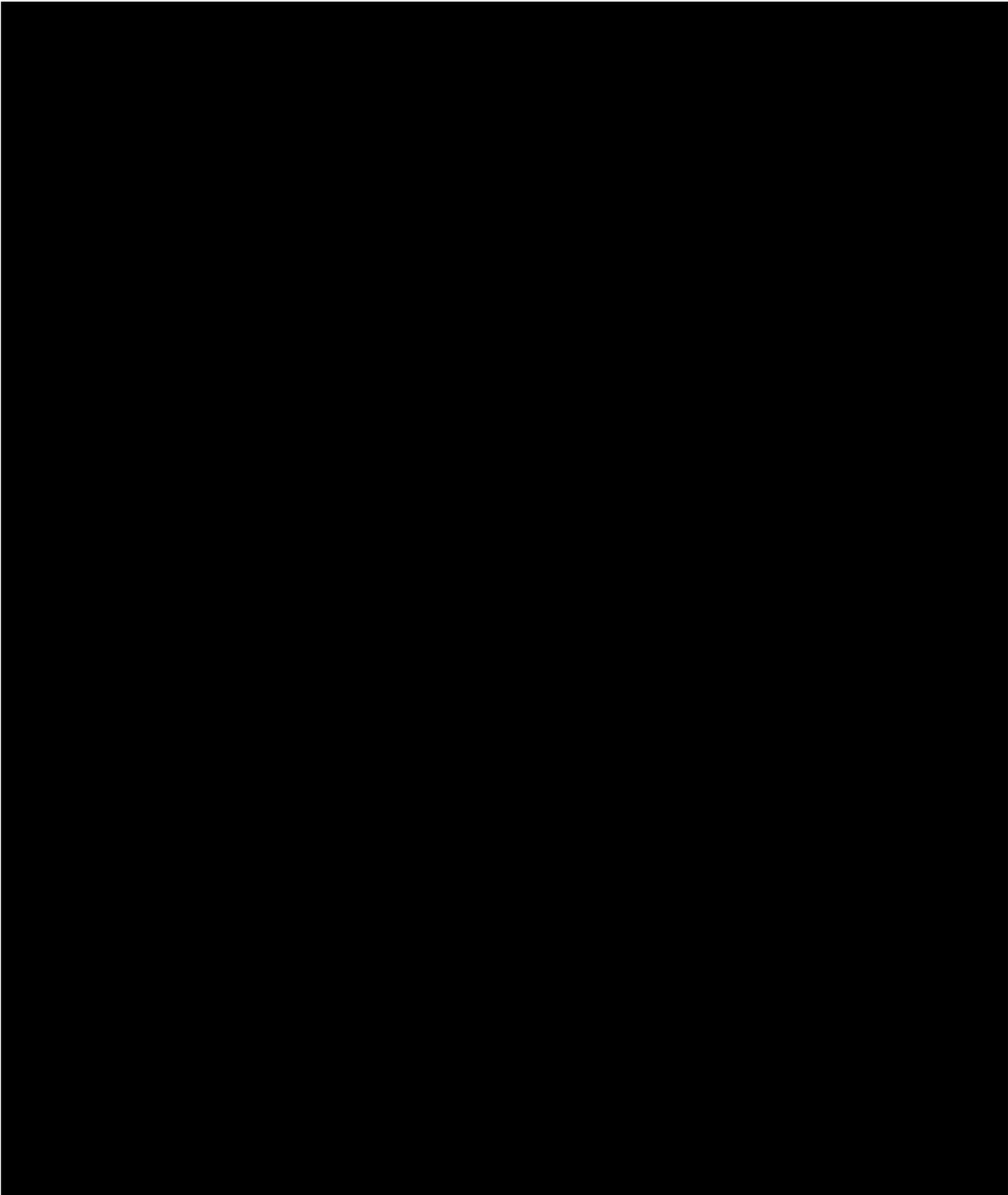
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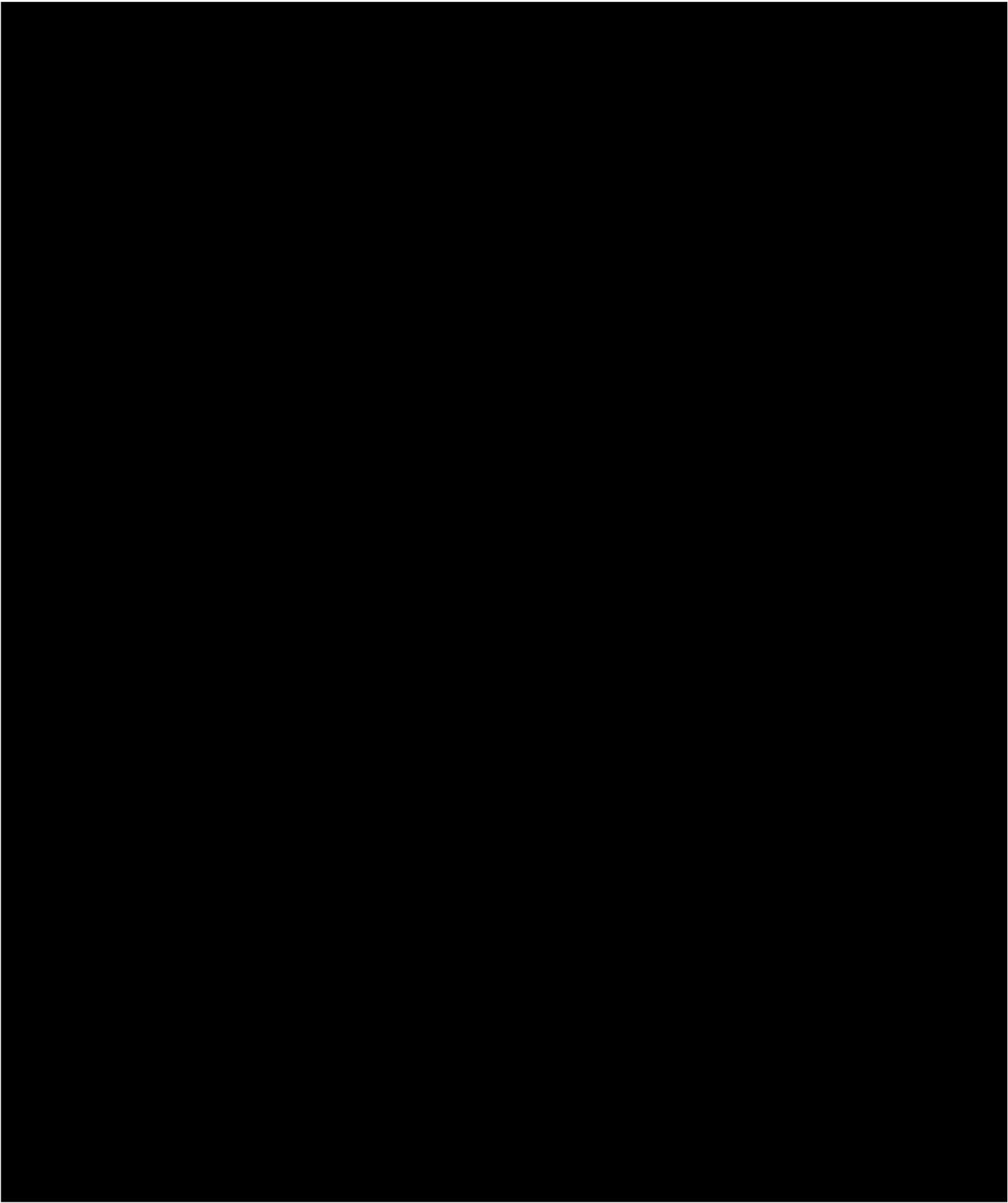
[Redacted]











To provide some historical context to how we reached the solutions in initial and amended grievance please see below.

{Email Insert :}

From: Joanne Holloway

Sent: Friday, July 21, 2017 9:13 AM

To: 'Karmen Ortloff' <kortloff@ifpte21.org>

Subject: RE: Holloway/Spencer grievance

My comments are in green.

From: Karmen Ortloff [<mailto:kortloff@ifpte21.org>]

Sent: Thursday, July 20, 2017 3:40 PM

To: Lakita Spencer <logan@portoakland.com>; Joanne Holloway <jholloway@portoakland.com>

Subject: RE: Holloway/Spencer grievance

Sure,

We'll be going off our grievance resolutions:

Work cooperatively on where to locate your work spaces in the new location (and Lakita has stated that since she has another remote office, that she might prefer to work out of there all the time... is there any developments or changes to this item for you, Joanne?) **I'm a short timer here with no more than six to nine more months. We were forced to work from cubicles for six months some years ago and that worked fine for me, so I can handle it.**

Establish a regular facilitated discussion on assignments, including information needed, tasks assigned, deadlines, etc. (Are there any detailed specifics you want to get out of this section... the more you can flesh out what you would like to see happen, the better change we can make it happen?) **It would be nice to have a yearly work plan that is clearly stated and discussed. I provide a monthly projects update to Brian, but it's as I see my work plan. I don't believe we've had a formal plan since FY 15. Since there were some comments on my yearly review this past year, I'd like some clarity around how decisions are made about reviews when there has been no discuss even though, that one was probably my last review.**

Report to and work with Supervisor Brian Kidd exclusively. (Lakita and I talked and she thinks that a transfer to the Land Side Operations would be doable for the work she does and actually might be a better fit for her position and remedy much of the issues she is having. Joanne, would you give some thought to what this might look like for you? Is there a transfer to another division that would make sense for you?) **I believe at this stage of her career, a transfer would be the best outcome for Lakita, not just personally but for her project management. Again, I'm a short timer and I am not interested in transferring to another department, but I would like to see this department get the support it needs to be as highly functioning as I have seen it in the past.**

In addition, I would like my 2013 Classification Request revisited and considered, and I'd like to receive the written final decision. I did receive the attached email from Christopher Boucher in March of 2015 basically blaming a retired staff member for HR not having a record of it, but since I am very aware that Deborah Ale Flint never reviewed it, I would like it to be reconsidered. I would like the position upgrade approved with back pay since I have been doing the entire job as it was designed for our former Senior Supervising (she supervised no one) Representative for over seven years.

Thank you Karmen Lee.

Joanne

We have plenty of time before our next meeting with them (wish we didn't have to wait so darn long) so you all can brainstorm together or separate and let me know any specifics you would like to see come from this.

Thanks.

Karmen Lee Ortloff

IFPTE Local 21

Exhibit I: Personnel Manual – Adopted Civil Service Board April 20, 2017

(e) Appeal to Board regarding Changes in Classification: In the event the Personnel Director has made a decision regarding a change to an employee's classification or regarding an employee's request for review of her/his classification, and the affected employee does not agree with this decision, the employee or affected union shall have an opportunity to be heard by the Board before the Personnel Director's decision becomes effective. The employee shall file an appeal with the Secretary to the Board within fifteen (15) working days of notice of the Personnel Director's decision. A letter sent to the affected employee's address of record via regular and certified mail, or hand delivered to the affected employee, shall constitute notification. At the hearing, the appointing authority, employee and/or affected union shall have an opportunity to present their positions, either orally or in writing. The Personnel Director or her/his designee shall also have an opportunity to be heard by the Board. The Board shall issue a final and binding decision regarding the classification issue in dispute.

Section 5.07 – Reassignment of Employees. An appointing authority may at any time assign any employee under her/his jurisdiction from one position to another position under her/his jurisdiction in the same class. The appointing authority may also, with the approval of the Personnel Director, reassign an employee in a position in the competitive civil service to a position of a similar class under her/his jurisdiction for which the maximum base rate of pay is the same.

Section 5.08 – Transfer of Employees. The transfer of a classified employee from a position under the jurisdiction of one appointing authority to a position under the jurisdiction of another appointing authority may be made with the consent of the employee and the approval of the Personnel Director and the consent of the appointing authorities concerned, provided the positions are in the same or similar class.

[REDACTED]

Appendix

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Supplemental Information for Civil Service Appeal: April 19, 2018

Summary

Pursuant to Personnel Rule 3.04(e) a hearing by the Civil Service Board has been requested to appeal the Draft Final Classification Study Report completed by Koff & Associates. My initial submission date was March 30, 2017. The Classification Study Report date of completion is unknown as the document does not identify this information. I also was not provided any personal notification or signed, original copy despite several requests. After obtaining legal representation I was provided a copy of my classification study from my attorney H. Larry Elam III. The Port's legal representative Thomas Richards with Richard Thorson Graves & Royer certified the copy provided to my attorney is the final.

After reviewing the Classification Study Report I received from my attorney on November 17, 2017, I identified a substantial amount of misreported information, provided by John Albrecht, Brian Kidd and Koff & Associates that warrant my appeal of the Port's classification study report. In addition, after reviewing the items submitted by the Port on March 1, 2018 I identified several items omitted from the initial documents provided for review by Koff & Associates and a dated report which I was not provided prior to the scheduled hearing date. Therefore, I have updated my summary and exhibits to reflect these omissions.

In addition to Personnel Rule 3.04(e), I would like to request a ruling on my behalf for the Port's failure to comply with Sections 5.07 and 5.08 in the Civil Service Rules and Procedures which allows for the reassignment and/or transfer of a Port employee.

On August 10, 2017 a presentation was conducted to the Director of Aviation Bryant L. Francis and Deputy Port Attorney Daniel Connelly. The goal of this meeting was to reach a modified remedy to the union's grievance filed on my behalf, which focused on providing me the opportunity to receive necessary support to implement the existing Aviation Customer Service Programs and initiatives I currently manage and to present information about why a transfer/reassignment of my position to Terminal Services would support the Aviation Division's current realignment efforts in the areas related to the terminal facility and Customer Experience.

In response to this meeting the Port agreed to transfer/reassign my position from Aviation Marketing to Terminal Services also known as Airport Operations, Landside which is provisioned under the Civil Service rules and regulations. Instead of complying with the Civil Service Rules the Port has conditioned my transfer from Aviation Marketing to Terminal Services on me signing a settlement agreement that waives my rights to pursue civil actions provisioned under California Government Code §§12900 – 12996.

In addition, because of filing several grievances against John Albrecht and Brian Kidd for harassment, disparate treatment, hostile work environment, retaliation and alleging claims of unlawful employment practices by my employer, the Port of Oakland, it is my belief that my classification (advancement) was denied and my transfer has been deliberately withheld despite the Port's knowledge of the Civil Service Rules and Procedures.

Section: 3.04 (e) - Appeal to Board regarding Changes in Classification

In **Exhibit C** of the Port of Oakland’s submitted documents to the Civil Service board on March 1, 2018 the Koff & Associates report provided by the Port of Oakland is dated **August 10, 2017**. The copy provided to my attorney H. Larry Elam III and I on November 17, 2017 was undated. I have included the copy I received in Exhibit 1A.

In **Exhibit F** of the Port of Oakland’s submitted documents, several items I provided Koff & Associates that summarized the programmatic changes related to the Visitor Information Program were omitted from the submission to the Civil Service Board. The one item included was a document I received after I filed my classification study in an effort to discredit my request. The initial documents submitted are included in **Exhibit 1B**.

The documentation provided to Koff & Associates substantiated my claims regarding the following:

- Information about the history regarding my classification.
- The goals of the program prior in years 2004-2005 to demonstrate the substantial change in the complexity of work assignments.
- The variables related supervision of the volunteer team I inherited, which summarized events that have contributed to the changes in the program outside my control.
- Verification regarding my position being mis-classified as entry level and warranting a higher classification level.

In response to **Exhibit’s C, E, & F** I would like to provide the following rebuttal regarding the substantial amount of misreported and omitted information provided by John Albrecht, Brian Kidd and Koff & Associates:

1.1 The classification study does not include a comparative analysis based on the following:

- 1) The organizational structure of current Port classifications.
- 2) Similar positions in comparable government structures
- 3) Similar positions within the Aviation Industry; and
- 4) The recommendation does not objectively analyze the scope and level of responsibility of my position as stated in the draft final classification study goals.

1.2 My current classification is listed as an “entry journey level” position. It also states that the work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility.

However, based on comparable government agencies and the Aviation industry, my position is classified as a professional and technical position that functions at an “advanced journey level” and the classification is stated to be responsible for planning, directing, managing and supervising a large and comprehensive volunteer program. This includes evaluating program needs, administering plans to meet these needs, which includes program promotion, marketing, recruitment, screening, training and supervising volunteers, interns and support staff.

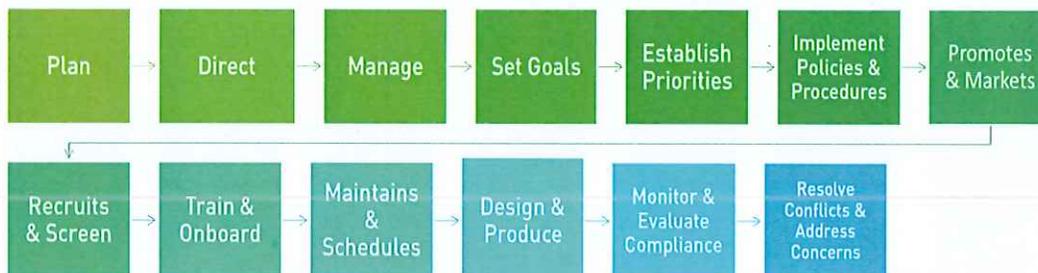


Figure 1: Customer Service Program Management Practices

- 1.3 The Aviation Marketing department manager John Albrecht's statement is inaccurate in his overview of volunteer inquiries by stating that 70% of the questions answered by my team are mostly related to ground transportation and customer use of hand held electronic devices have decreased the amount of traffic to our information centers. There is a similar comment on pg. 5 of the Koff & Associates report regarding use of smartphone's diminishing customer contact with the volunteers/information centers.

There has been no quantitative study by Koff & Associate or John Albrecht to substantiate this statement. Neither John Albrecht nor Brian Kidd have daily contact with the information centers or conduct regular observations that would allow them to assert a decrease in customer inquiries. In fact OAK's passenger growth continues to be on an incline as demonstrated in my report. To accommodate the advancements within the airport industry and the demand for increased air travel the Port invested into two substantial capital improvement projects to build and expand the infrastructure of our information centers. Terminal 1 was renovated in 2015 and Terminal 2 in 2007 as a part of the Southwest Terminal Expansion Project.

It is also important to note that I have daily contact and regularly observe the operations first hand in my role as a program supervisor and as the staff member responsible for training new and existing volunteers on the operations of the airport.

In addition, in staying abreast to airport consumer patterns, personal habits contribute to travelers still printing their boarding pass at home or using a kiosk when they arrive at the airport versus using their smartphones. Volunteers frequently receive passenger requests for printing travel documents or available options for self-check which has prompted added ticketing kiosk inside our airport terminals and printer installation in our information centers. Currently Oakland International Airport (OAK) has 18 self-check in kiosks in our international terminal which does not include additional kiosks provided by our airline tenants JetBlue, Delta, Alaska, American Airlines and Spirit. International passenger check-in require kiosks with passport readers which is not available by smartphone. In fact, in the Airport's February 2018 passenger traffic volume report we had 849, 529 airline passengers who traveled through our facility marking a 5.3 percent increase from 2017 which is due to our increased international air service. Also, it is not guaranteed that airport patrons will have smartphone service or accessible Wi-Fi upon arriving at OAK which is identified as one of highest ranking consumer complaints in our survey & customer feedback reports.

A summary of the key areas we receive customer inquiries about is located on pg. 5 of my classification study appeal. Similar customer feedback items can also be found on pgs. 16-18.

The service needs of OAK's passengers have become complex in nature, especially with the increased international air service. I believe this viewpoint would have been presented if the Koff & Associates analysis would have included observing the current operations, interviewing members of the volunteer team or reviewing the survey results and customer feedback reports prepared by myself and other Aviation Marketing staff members or Airport Operations staff members who were available to provide this information during the course of the classification study.

For these reasons I provided an overview of OAK's growth, Airport Practices, Customer Experience and Volunteer Program Management practices on pgs. 3-5 that refute these generalized statements that attempt to diminish the strategic impact of my position and programs, related to the operations on an airport wide basis.

- 1.4 The difficulty in getting volunteers to donate time is a direct result of the volunteer teams work efforts being demoralized by the department manager John Albrecht through retaliatory acts such as cutting the program budget, taking away volunteer badging privileges and program incentives. These items have been raised in a

number of grievances and was presented to the Aviation Director Bryant Francis and Port Deputy Attorney Daniel Connelly on August 10, 2017 resulting in a proposal to transfer/reassign the program with my position to terminal services which would allow for enhanced strategical support in line with the current Aviation division realignment.

1.5 The subsets of volunteers, the survey takers and buskers were not implemented as a result of a shrinking program as stated by both John Albrecht and Brian Kidd, but were implemented to support Oakland International Airport's customer service initiatives and efforts to enhance the overall passenger experience. The Assistant Director of Aviation Kristi McKenney instituted a passenger experience taskforce to evaluate ways OAK can remain competitive in the customer services we provide, which led to the institution of several customer service initiatives. Also, the skill set that I possess warranted the change from previous staff members who are no longer with the department creating a need for project reallocation in the Aviation Marketing department. During this same time period the Aviation division had undergone various strategic realignment processes to support the Aviation Division work goals in the areas the terminal facilities and customer experience. There have been a number of change across the division and as a part of this process the entire division was relocated into one central headquarters location to improve the efficiency of the division. Please see **Exhibit 1D** which validate my involvement with the performance arts program during its implementation in 2010, documentation of the transition of the program to my position in 2013, daily performances etc. and **Exhibit 1E** from the Director of Aviation about our realignment and organizational direction.

1.6 In line #1, pg. 2 of the Koff & Associates (K &A) classification study it states that Mr. Kidd and I work in tandem regarding hiring and terminating volunteers based on Ms. Spencer's recommendation. This statement is untrue. In fact, I was surprised when I read this statement.

In an effort to undermine my work responsibilities and in retaliation for me filing for a desk audit this method was changed. Mr. Kidd sits in my interviews as witness. I lead and facilitate the entire interview and onboarding process by completing the initial interview prior to any involvement by Mr. Kidd, I also designed the questions for the interview rating system, the orientation materials, new volunteer training checklists, peer to peer training processes and etc.

Since my initial hiring in April 2007 I have hired and terminated volunteers.

1.7 In **Exhibit C**, line #1, pg. 2 of the K & A classification study it states with computerization of the scheduling system volunteers can schedule their own time. This is only partly true. Technological integration does not negate the existing personal habits of the team to have support with scheduling. Many of the volunteers are seniors and struggle with the integration of computers as many of them do not use computer devices outside their role at the airport.

In addition, to ensure program compliance, there are provisions in place that limit volunteer access to our online scheduling system Volgisitcs. Volunteers are not allowed enter regular scheduled shifts, make schedule adjustments, substitutions entries and conduct shift removals within a 24 hour period.

*** Performers and Survey Ambassadors do not have any scheduling capabilities.**

1.8 In **Exhibit C**, line #2, pg.2 of the supervisor's comment and throughout the report statements such as, "Ms. Spencer's role is not to manage any functions but to coordinate" and "she oversees the volunteers of the volunteer program but it is not the same level of responsibility as other supervisors have" demonstrates a bias toward my position's function and shows a lack of objectivity towards my work responsibilities. I am the sole point of contact for the airports front line customer service teams. I oversee and evaluate the day-to-day activities of both the volunteer and performance arts program. Examples: Volunteer to Volunteer conflicts, program concerns, noise compliance etc.

As a verb: In definition, **to manage** is to direct or be in charge, is the act of managing or controlling something, while **to coordinate** is to synchronize activities. **As an adjective** coordinate is of the same rank; equal.

- 1.9 In **Exhibit C** of the supervisor's comments with regard to integrated technology options my supervisor emphasizes this has not happened yet. The research and proposals were completed, however in retaliation approvals continue to be delayed or ignored, which is outside my control.

The same is true regarding several of the other items listed as not occurred yet, that are not accurately reported. My responsibilities related to these items were also completed, which includes conducting research, cost projections, developing project timelines, working with vendors to secure draft contract agreements etc. Due to ongoing grievances and retaliation, budgetary authorization is intentionally withheld by the department manager John Albrecht. Nonetheless, I continue to complete the tasks required as these operational needs are ongoing as technology, customer experience trends and airport best practices continue to be elevated across the industry.

- 1.10 In line #15, pg. 2 of the K & A class study I would like to refute the information provided. Mr. Kidd's involvement as it relates to the Customer Satisfaction Experience Survey is the production of reports for his chain of command. We each have different but equally important uses for the Survey data.

In addition, the day-to day implementation and oversight of activities is included in my work plan since I recruit, staff, schedule and assign ambassadors. I also track their time and process stipend payments etc. **Without the completion of these duties the program cannot be carried out and airport management strategies and goals cannot be achieved.**

I worked directly with our summer interns to establish policies and the policies which are modeled after the initial policies I designed for the volunteer program during my employment at the Port. Again, it is stated by Mr. Kidd that I do not manage this process despite demonstrated completion of these duties.

Another fact to note is the Aviation Marketing Department has not had a formal department work plan since 2015. (See pg. 38 of my classification appeal & Exhibit 1C). Each staff member develops their own work plan that is used as a documentation tool to measure performance for annual reviews.

- 2.0 In line # 17, pg. 2 of the K&A Study it states the surveyor team consists of volunteers from the existing information center volunteers. This is also falsified information. I developed two separate job descriptions and recruitment, hiring and assignment placement is done specifically for the survey ambassador position.

The same assertion is made in the summary on pg. 5 and it is stated by Mr. Kidd that it was his idea to expand on the use of the airport's volunteers.

The survey position has a premium and the information center positions do not receive the same premium. Also surveyors are required to complete one shift a week versus our information center volunteers who are only required to complete two shifts a month. The compensation structure and time commitment is vastly different.

Performance Arts Program

The Performance Arts Program has over 30 live performers and accumulates over 4,000 hours of music annually. The genres of these artist range from folk, jazz, blues, classical, pop and more. We have a harpist, several guitarists, ukulele, cello, violin players, and a number of piano/keyboard players, bands and singers. Musicians in our performance arts program have been featured in both of the Port & OAK's media publications and have received local & national news coverage despite my supervisor Brian Kidd statement that the program has not yet matured. The links to preview some of these artists are on pg. 28 of my submitted report.

Managing this program also includes working with local community organizations, artist collectives and in collaboration with airline tenants to implement special performances in the airport terminal. I also utilize social media among other online advertising opportunities to promote the program and recruit local artists.

I have planned special performances for large groups such as:

- The Mt. Eden High School Choir
- Oaktown Jazz Workshops
- The Academy of Hawaiian Arts
- The 2016 Merrie Monarch Team
- The Cal State Athletics Band

The duties required to execute these tasks can be found on pg. 9 of my March 1, 2017 submitted report.

The organizational and strategic impact of this program, is based my ability to successfully manage a program that provides exposure opportunities to local musicians and showcase the cities talent for visitors that are unfamiliar with the rich culture of the Bay Area region. This program works to enhance the customer experience of the millions of travelers who fly in and out of our airport. I use these same philosophies when I am recruiting, selecting and scheduling special performances with local music programs and arts organizations. Mr. Kidd has had minimal involvement despite his assertion in line#19 of the K&A study.

It is also important to note the planning and management of this program is not synonymous to the management practices of the information center volunteers, or customer satisfaction ambassadors.

Conclusions

The classification study appeal and supplemental information provided in this report demonstrate a number of deficiencies in the study completed by Koff & Associates such as the following:

- Lack of comparative analysis methods that evaluate my classification based on the Aviation Division's current organizational structure, similar positions in comparable government agencies or the Aviation industry.
- Failure to demonstrate objectivity to the contribution of volunteer teams in the aviation industry and its ability to impact the terminal facility and customer experience.
- Insufficient evidence that validates the claims that my position is an "entry journey level" position, which does not independently perform analysis and has no supervisory or lead responsibility.
- Omitted information that validates my classifications strategic impact to the airport operations and goals & objectives to enhance customer and terminal services as our passenger growth continually increased over the last four years.
- Omitted information that demonstrated changes in the complexity of work carried out in my position versus when my classification was last reviewed by the Civil Service Board.

In addition, the classification study appeal, transfer request and supplemental documents report establish how my classification is more strategically aligned with Terminal Services (Airport Operations, Landside) versus Aviation Marketing based on my core responsibilities being connected to airport operations, the current Aviation Division Realignment, changed organizational structure and expansion to how we achieve the business goals of the operation.

Based on the information provided in my appeal I am requesting reclassification of my position by the Civil Service Board to a higher classification and a ruling on behalf to grant my transfer/reassignment as provisioned under the Civil Service rules and regulations for Port employees.

Exhibit 1A



DRAFT FINAL CLASSIFICATION STUDY REPORT
AVIATION ASSISTANT MARKETING &
COMMERCIAL REPRESENTATIVE

Port of Oakland

Submitted By:

Koff & Associates

GEORG S. KRAMMER

CHIEF EXECUTIVE OFFICER

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OVERVIEW

In June 2017, the Port of Oakland (“Port”) retained Koff & Associates (“K&A”) to conduct a classification review of an Aviation Assistant Marketing and Commercial Representative position.

CLASSIFICATION STUDY GOALS

The goals and objectives of the classification study were to:

- Obtain detailed information regarding the studied position through a variety of techniques, including a written Position Description Questionnaire (PDQ) form describing duties, required knowledge, skills, and abilities, and other aspects of the body of work, and interviews with the incumbent, other Aviation Marketing and Commercial Representatives, and her supervisors;
- Analyze the current Port classification specifications for Aviation Assistant Marketing and Commercial Representative, Aviation Associate Marketing and Commercial Representative, and Aviation Senior Marketing and Commercial Representative;
- Provide a recommendation that recognizes the scope and level of responsibility of the studied position; and
- Provide sufficient documentation to allow the Port to integrate the studied position with the Port’s overall classification plan and operational practices.

STUDY PROCESS

The classification study procedures were as follows:

- A conference call was held with the Port’s Human Resources Supervisor to clarify study scope, objectives, processes, and deliverables.
- The incumbent completed K&A’s Position Description Questionnaire (PDQ) which was also reviewed by her supervisor and manager for feedback and concurrence.
- Consultant staff reviewed the PDQ form and interviews were conducted with the incumbent and her supervisors, as well as incumbents in similar classifications:
 - Lakita Spencer, Aviation Assistant Marketing and Commercial Representative.
 - Brian Kidd, Aviation Supervising Marketing and Commercial Representative
 - John Albrecht, Aviation Marketing Manager
 - Joanne Holloway, Aviation Associate Marketing and Commercial Representative
 - Crystal Heavers, Aviation Associate Marketing and Commercial Representative
- Following the analysis of the data collected, classification recommendations were developed for Human Resources, management, union, and employee review.



CLASSIFICATION ANALYSIS AND RECOMMENDATION

Per Ms. Spencer's PDQ and interview, the purpose of her position of Aviation Assistant Marketing and Commercial Representative is to oversee the Visitor Information Program (VIP) and the 70+ volunteers who staff the two visitor information centers/booths in the Oakland International Airport (although it is our understanding that the number of volunteers has decreased to approximately 53). In addition, Ms. Spencer coordinates the Performance Arts performers and the Customer Satisfaction Survey team, who are a part of the customer relations program. She ensures that passengers and tenants receive service that represents OAK's customer service values. Ms. Spencer performs the following duties:

1. **Visitor Information Program:** Oversee 70+ volunteers, ensure program compliance with the Port Strategic goals, oversee daily volunteer activities, evaluate performance, reward strong performance and address performance issues. Ms. Spencer inherited this program and has been involved in updating processes and policies, as well as revamp the scheduling of volunteers, which is now computerized and volunteers can schedule their own time. Mr. Kidd and Ms. Spencer work in tandem regarding hiring and terminating volunteers based on Ms. Spencer's recommendations.
2. Manage online volunteer shift assignment scheduling, timesheets, personnel updates and volunteer announcements. (Per supervisor's comments, Ms. Spencer's role is not to manage any functions but to coordinate.)
3. Manage Volunteer Program Benefits: Volunteer Stipend Reimbursements and Non-Shift Parking Requests.
4. Recruit, screen and train new volunteers: advertise, online recruitment, bi-lingual & ASL recruitment.
5. Design Visitor Information/Program Guide/ Signage Updates.
6. Coordinate Convention Visitor Bureau (CVB) deliveries, stock and monitor availability of local convention & visitor bureau travel guides and around transportation information.
7. Maintain and update airport resources, ground transportation and hospitality program guide for volunteer team.
8. Plan and execute Quarterly Staff Meetings for volunteer team.
9. Assist volunteers with completing and passing FM background checks and Computer Based Training (CBT Requirements).
10. Develop and provide ongoing computer, customer service and ADA trainings.
11. Oversee Information Booth Stocking.
12. Explore options around Integrated Technology Options-Airport Kiosks, Service Robots. (Per supervisor's comments, this has not occurred yet.)
13. Plan recognition and volunteer excursion events.
14. Assist with Aviation Marketing special events.
15. **Customer Satisfaction Experience Survey:** Execute annual plan for volunteer interviewers (the plan was originally put together by Mr. Kidd and he directs Ms. Spencer to execute).
16. Manage In-Terminal Survey processes and policies. (Per supervisor's comments, policies for activities are set by the department supervisor. Again, Ms. Spencer does not manage this process but coordinates and executes as directed by the supervisor.)
17. Train and oversee Customer Satisfaction surveyor team (the team consists of volunteers from the Volunteer Programs, i.e., volunteers get to choose whether they want to work at an information booth or take surveys, they are trained in both).
18. Plan and conduct briefings with survey team to ensure we meet quarterly quotas.



19. **OAK's Performance Arts Program:** Coordinate overall program (the program was originally developed and managed by Joanne Holloway who worked on the first set of policies with the Port's legal department to ensure that the program met regulations); provide staff oversight and recruitment, auditions, scheduling. (Per Mr. Kidd's feedback, performers are selected by both him and Ms. Spencer.)
20. Maintain performance arts signage and in-terminal welcome banners; develop and implement procedures for related terminal signage and notifications, including featuring schedule of performances on social media websites and employee communications.
21. Process parking requests and compliance for OAK performance arts program.
22. Secure OAK performance arts program sponsorship for recognition event give-aways, bring performers post-security, set-up branded stages.
23. Maintain creative brand for OAK performance arts program: signage, outreach materials etc. (Per supervisor's comments, this has not occurred yet.)
24. Develop marketing partnership opportunities with local performing arts programs and entertainment venues to diversify performance types. (Per supervisor's comments, this has not occurred yet.)
25. Customer Relations: Execute passenger retention projects: determine incentives and proposed amenities. (Per supervisor's comments, this has not occurred yet.)
26. Implement customer service values: re-engage Port Aviation employees, OAK tenants, volunteers and partners. (Per supervisor's comments, this has not occurred yet.)
27. Oracle: Process monthly contract payments for department.
28. Oracle: Process Payroll and maintenance work orders as needed.
29. Manage vendor verifications and compliance, including payment coordination, reconciliation, subscriptions etc.

Ms. Spencer's work assignments have not changed significantly over the recent period of time. Over the course of her employment, she received additional work responsibilities from the Aviation Associate position when staff member Rosemary Barnes resigned around 2012. At the time Ms. Barnes resigned, she was primarily responsible for implementing customer service initiatives and managed the customer relations program. Ms. Barnes' work plan included implementation and management of engaging Airport staff, tenants and partners around the airport's customer service excellence program. The program coordination included updating the airport's customer service wall and the Performance Arts program. Since Ms. Barnes left the organization, Ms. Spencer has been responsible for designing and maintaining the content updates on the customer service wall and coordinating the performance arts program. Prior to Ms. Barnes, these duties were carried out by Associate level staff Joanne Holloway. Ms. Holloway managed the Performance Arts program from its inception. Ms. Holloway was also responsible for coordinating in-terminal passenger surveys, which were administered by ASQ, an outside firm. When Ms. Spencer was assigned the Customer Satisfaction Survey program, she was tasked with recruiting an internal team using similar approaches she uses for the Visitor Information Program.

Ms. Spencer has worked collaboratively with both Associate Representatives Joanne Holloway and Rosemary Barnes to design presentations, suggest practices and implementation guidelines for improving the terminal experience and engaging OAK customers.

Initially, Ms. Spencer was hired solely to coordinate the Visitor Information program. Over the past nine years, her position responsibilities have expanded in that she now also coordinates the Customer Satisfaction Survey program and the Performance Art program.



Comparative Analysis

In order to determine whether, or not, the preponderance of Ms. Spencer's work falls within the Aviation Assistant Marketing and Commercial Representative classification, we reviewed the current Port classification description.

The following outlines the responsibilities and duties stated in the Aviation Assistant Marketing and Commercial Representative classification:

Per the Port's classification description, the Aviation Assistant Marketing and Commercial Representative is responsible for oversight and coordination of various aspects of the volunteer Visitor Information Program (VIP) and the Airport and tenant employee customer service training program (Ambassador Program) at Oakland International Airport. This classification is considered the entry level of the Aviation Marketing and Commercial Representative series. The work performed is less difficult and more routine in nature and does not independently perform analysis and has no supervisory or lead responsibility. Initially, incumbents work under close supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned. It is distinguished from the next higher level of Aviation Associate Marketing & Commercial Representative in that the latter performs duties in the promotions and marketing profession and may supervise support staff.

The Aviation Assistant Marketing and Commercial Representative's typical job functions include (we bolded the statements that relate to Ms. Spencer's assignments):

1. **Schedules and assigns a staff of volunteers to work at 5 information booths at both airport terminals for 4-hour shifts, 7 days per week; keeps track of their time.**
2. **Recruits for volunteers at local area Senior Citizens Centers; gives presentations on volunteer opportunities at the airport; also places free ad in local area newspapers.**
3. **Acts as liaison between Aviation Marketing and Landside Operations to gather ground transportation information listings to update the Airport's website and Travel Planner publication.**
4. **Trains volunteers on their duties and provides ongoing computer training; provides job orientation and assists volunteers on completing and passing FAA background checks.**
5. **Processes stipend reimbursements to volunteer workers for meal/refreshment, transportation, and blazer; prepares reports to reflect any and all monies going out; prepares requests for checks to Finance.**
6. **Monitors individual volunteer performance; follows up on any comments, suggestions, and complaints; gives praise for good work; organizes and plans recognition events for volunteers.**
7. **Maintains an information book containing information about the Airport and resources available, such as ground transportation, for use by the volunteers; tallies questions asked at the Visitor Information booths by the traveling public to be used in updating the information book; passes complaints made by travelers to the appropriate departments for response or correction of problems.**
8. **Maintains database of inquiries and complaints from the public for use in producing statistical reports; maintains a database of Airport resources, and a database to track compensation of the volunteers.**
9. **Maintains and updates IFLYOAK ground transportation hotline. Schedules volunteer(s) to staff this phone service.**



- 10. Fundraises and solicits gifts and in-kind donations for volunteers from community businesses and others.**
- 11. Performs related duties as assigned.**

Ms. Spencer clearly performs the assignments of the Aviation Assistant Marketing and Commercial Representative classification. Ms. Spencer requested a reclassification to a different classification because she feels that the evolution of her duties over nine years have exceeded her current classification. For example, the Customer Satisfaction Survey program and the Performance Art program are not specifically referenced in the current classification. However, per feedback from her supervisor and manager, the Customer Satisfaction Survey program is not really a separate program but was an idea by Mr. Kidd to expand the use of the airport's volunteers. Due to smartphones, many travelers look up information on their devices and no longer take advantage of the airport's information booths. In fact, per the job description, there may have been as many as five information booths; currently, there are two. Therefore, the need for volunteers staffing those booths has declined. Mr. Kidd's idea of using volunteers to conduct surveys added an additional level of utilization of the volunteers. Mr. Kidd himself developed the program, created the software, purchased the iPads to take the surveys, and tabulates the results. Ms. Spencer coordinates the staffing and training aspects.

Aviation Associate Marketing and Commercial Representative

In order to understand the bigger picture of Ms. Spencer's department, how and what work is assigned to other positions, and at which level of classification the work is performed, we conducted a comparative analysis by studying two other positions in the Marketing Department: those of Joanna Holloway and Crystal Heavers, who both are Aviation Associate Marketing and Commercial Representatives.

Initially, we reviewed the classification description of this classification in comparison to Ms. Spencer's:

The Aviation Associate Marketing and Commercial Representative implements programs that promote and market the Oakland International Airport, assists in the development of market analysis and performs related work as assigned. This is a journey-level classification that performs a limited range of duties in the promotions and marketing profession and may functionally and/or technically supervise support staff. It is distinguished from the Aviation Senior Marketing & Communications Representative in that the latter performs more difficult tasks. It is distinguished from the Aviation Assistant Marketing & Communications Representative in that the latter requires no prior professional experience and works under immediate supervision.

The Aviation Associate Marketing and Commercial Representative's typical job functions include (again, we bolded the statements that relate to Ms. Spencer's assignments):

- 1. Implements marketing and promotional strategies to develop and sustain support for airport projects and funding.**
- 2. Maintains locally based airline and travel industry and corporate travel contacts to develop a support network for airport business activities and programs, including cooperative efforts with those contacts to support new service.**
- 3. Provides and presents general information related to airport facilities and features to enhance their visibility and usage; organizes tours of Oakland International Airport.**



4. Performs research and gathers industry data to target existing and to identify new markets for purposes of directing promotional efforts.
5. Prepares, edits and produces **reports**, brochures, articles and other **visual promotional presentations**.
6. Leads department event planning efforts.
7. Performs related duties as required.

Ms. Spencer's responsibilities are not captured in this classification. She does assist with tours to OAK, some of the special events, does the procurement and accounting support piece behind what is needed for special events, but otherwise does not have assignments that relate to the Associate classification.

In addition, the variety and breadth of responsibilities assigned to Ms. Holloway and Ms. Heavers is greater than that of Ms. Spencer's. Their roles are also more strategic and have greater impact on the strategic operations on an airport-wide basis. For example, Ms. Heavers is in charge of key strategic relationships between the airport and the community, Visitor's Bureau, Economic Development Institute, airline partners, etc. Ms. Heavers is also revenue generating. Ms. Holloway also has financial responsibilities in that she oversees the advertising program with a budget of \$2 million, including doing frontline negotiations for contracts, working with the Port's legal department, advertising agencies, laying out the creative ad strategies, etc. Ms. Holloway also runs the consumer affairs division. Both incumbents also function more autonomously and independently when given a strategic assignment and seeing it all the way through from inception to implementation, which is something not typically assigned to Ms. Spencer's position. Ms. Heavers establishes relationships between airport stakeholders, and potential partners, and then negotiates contracts. Ms. Holloway negotiates contracts around placing ads and decides when and where ads are placed.

Additional detail regarding Ms. Holloway's assignments:

1. Manage all professional service contracts, anything with creative or ad efforts.
2. Act as media planner and buyer for all ad efforts.
3. Manage contract with two creative firms that create ads and manage and design videos for ad placements; e.g., contract with KQED, supporting Check Please Bay Area and Broadcast News; video shows on programs, and the messages are heard on the news.
4. Cal Athletics: advertise with them in stadiums, on t-shirts, etc.
5. Manage calls from publications that want OAK to advertise with them and review their media kits and make a recommendation to supervisor.
6. Intersection Media: they place ads for OAK in BART stations, cable cars, etc; work with Intersection, what are needs, specs for any given ad, then take to creative team and they will design ad, they submit 3 ads, get them approved, then back to Intersection, upload ads, where to place, for how long; write the contract, get that approved, manage their contract through payment.
7. Special projects: strategic partnership with art venues, e.g., Berkeley Rep and ACT, Oakland Symphony; have contract with them to ad in playbills and have partnership, possibly expand on Ms. Spencer's project of performance arts.
8. Cooperative ad program with airlines, when an airline expands service, OAK has a budget that allows them to advertise OAK services and Ms. Holloway works on contracting with them, their ad agency, and OAK's legal and procurement department to get them reimbursed; because air service has expanded, there are 7 different contracts Ms. Holloway is managing with legal, she



- writes them, then works with legal, and then with ad agency that works with airline. We want to reimburse the airlines directly as opposed to going through the ad agency.
9. Camelot: ad agency for Southwest, when they start new service, they get \$100,000 for a specific route, we make sure they have professional services contract so we can reimburse them.
 10. Decisions: most of my job I've been doing for 5y, so I'm really aware of what needs to be done and what John needs to approve, he wants final approval on all ads; but if agency calls him to ad with their publication, I can say confidently when we can't do it at this time, whether we work with any given vendor; I work with airlines directly on their contracting, provisions, writing them, submit to finance and legal, I do all that on my own.
 11. Still manage community relations function.

Additional detail regarding Ms. Heaver's assignments (Ms. Heaver's has only been in her position for a few months and is still learning the full scope):

1. Cultivate and maintain partner relationships, e.g., travel: local destination marketing organizations, Visit Oakland, Visit Berkeley, Visit Napa Valley, Visit TriValley, get better feel for what their communities' needs are in terms of air service; it's a big piece of bringing people into the Bay Area.
2. Relationship with East Bay Economic Development Group, Innovation TriValley, more on corporate side of things, what are corporate needs on air service.
3. Lead event planning efforts, ranging from small inaugural events, e.g., Southwest announces new route to Newark, we do gate event to promote that. Also larger events to promote OAK and East Bay, Airport, at big conferences and conventions and networking events.
4. Implement marketing and promotional strategies; Supervisor and manager come up with big ideas and Ms. Heaver's job is to implement those ideas; help create and implement any collateral, reports, brochures, email marketing, visual presentations, etc. that may be needed.
5. Promo materials: Summer of LOVE campaign in Bay Area, we do mailers and email marketing campaigns.
6. Decisions: the position functions very autonomously, run with big ideas, bring creativity to table, put creative spin on conceptual ideas.
7. Special projects: big event in September, partner with airline partners; finetune and put creative touch on video brochure mailer that was already in place.

Again, as stated above, the breadth and variety of work, and the strategic aspect of the work that has airport-wide impact, in addition to the financial responsibilities, are what distinguish Ms. Holloway's and Ms. Heaver's assignments from Ms. Spencer's.

Aviation Senior Marketing and Commercial Representative

In order to do our due diligence, we also reviewed the classification of Aviation Senior Marketing and Commercial Representative:

Per the classification description, the Aviation Senior Marketing & Communications Representative manages communication between the Oakland International Airport and its key publics to build, manage, and sustain its positive image. This advanced journey-level classification performs the full range of duties in the public relations and marketing field. This classification performs highly independent and specialized public relations work, as well as may functionally and/or technically provide lead direction for professional



and support staff. The incumbent is responsible for handling and maintaining a positive relationship with the media. It is distinguished from the Aviation Supervising Marketing & Communications Representative in that the latter is a supervisory level classification. It is distinguished from the Aviation Associate Marketing & Communications Representative in that the previous is a journey-level classification that performs a limited range of duties in the public relations and marketing field.

The Aviation Senior Marketing and Commercial Representative's typical job functions include:

1. Assists in managing the Oakland International Airport public relations program including day-to-day management of news media inquiries and press releases.
2. Acts as Oakland International Airport spokesperson and responds to daily questions from all media entities and journalists regarding Airport activities.
3. Writes and distributes all Oakland International Airport press releases; works closely with Airport officials to ensure communication needs are met; ascertains information for developing responses to media inquiries; and distributes press releases via Airport website and media.
4. Plans and implements Oakland International Airport press events including determining location, images being conveyed, time of day date as well as other factors that would help grow the Airport's image; ensures that Airport officials and VIP's have prepared written statements; and develops back up plans for press events in the event that unforeseen occurrences disrupt initial plans.
5. Assists in handling the online publication aspects of the Oakland International Airport website including maintaining the publications and ensuring that the information contained on the website is accurate.
6. Manages production of Airport Community Newsletters (Point to Point and Travel Planner); decides the format, layout and images; determines what stories should go into the publication, gathers facts, and works with SME's to ensure information being included in newsletters is correct; and writes and edits stories for the publications.
7. Develops communications plans and strategies to determine ways to promote, publicize and convey the Airport in a positive light. This includes strategically crafting message points.
8. Coordinates 24/7 media on call calendar for public relations staff.
9. Performs related duties as required.

The Aviation Senior Marketing and Commercial Representative classification does not represent Ms. Spencer's duties and responsibilities.

Supervisor/Manager Feedback

Brian Kidd, Aviation Supervising Marketing and Commercial Representative, and John Albrecht, Aviation Marketing Manager both provided feedback that Ms. Spencer significantly overstated her responsibilities. Since Mr. Kidd is the supervisor of the department and Mr. Albrecht is the manager, they both do not see that Ms. Spencer has management-level responsibilities, nor is she expected to.

Both Mr. Kidd and Mr. Albrecht provided clarification on several areas in Ms. Spencer's PDQ:

- Ms. Spencer does not manage employees; she oversees the volunteers of the volunteer program but it is not the same level of responsibility as other supervisors have. She has daily involvement



with a subset of the volunteers in the visitor information program, as stated in her job description. The current size of the program is 53 volunteers and six performers.

- Work priorities are set at the department level. Staff, in concert with the Supervising Marketing and Commercial Representative, are charged with determining the best approaches to executing the objectives in the department work plan.
- Bringing new volunteers into the program is not done without department supervisor involvement.
- Policies are currently only well developed for the visitor information program, not the Customer Survey process or Performing Arts.
- Program budget is determined by the department manager, in consultation with the supervisor, and Ms. Spencer, in coordination with the Supervisor, ensures that program expenditures are within budget.
- Ms. Spencer unilaterally cancelled 1-on-1 meetings with her supervisor, although there is still frequent interaction on a daily basis.
- Ms. Spencer is not in charge of strategic goals.
- Program standards for the visitor information program do exist, to which the volunteers are trained.
- The volunteers, musicians and interviewers are not Port employees, and as such are not subject to the same standards and processes of protection, hiring, termination and evaluation.
- Duties in section #7.0 of the PDQ are overstated; throughout, "coordinate" rather than "manage" is a more accurate verb/term.
- Activity #13 in section 7.0 in the PDQ has not occurred, i.e., provide Integrated Technology Options-Airport Kiosks, Service Robots.
- 7.0 Task #20 "HR oversight" is not an appropriate description; again, "coordination" is a better term.
- 7.0 Tasks #25 -28 have not occurred; i.e., maintain creative brand for OAK performance arts program: signage, outreach materials etc.; develop marketing partnership opportunities with local performing arts programs and entertainment venues to diversify performance types; customer relations: execute passenger retention projects: determine incentives and proposed amenities; nor implement customer service values: reengage Port Aviation employees, OAK tenants, volunteers and partners.
- Position responsibilities have not changed in the past two years.
- Human Resources management skills are not required.
- Fundraising strategies are no longer required as it was determined several years ago that this effort was not an efficient use of staff time.
- Volunteers and performers are not paid; they receive a small snack stipend, a shift stipend set by policy determined by the Supervisor to help fill certain shifts with low demand, and are reimbursed for mileage according to existing policy.
- The performance arts and survey programs have not matured to their full potential. Again, policies are set at the supervisor or manager level.

Recommendation

Per our analysis, it does not appear that Ms. Spencer's position is a good fit for any of the other levels within the Aviation Marketing and Commercial Representative class series. Each level has a classification description that is very specific to the assignments of each level. The Assistant-level is specifically designed around Ms. Spencer's assignments and still is the best fit for her position. While the Customer



Survey and Performance Arts assignments are not specifically called out in the class description, they are not considered two completely new and separate programs requiring additional skill sets but rather are an extension of the Volunteer Program. In comparison to other levels with the Aviation Marketing and Commercial Representative class series, Ms. Spencer's position is not a fit for the Associate or Senior level, per analysis above.

On August 7, 2017, Ms. Spencer submitted additional information to be considered for this analysis, and we feel that this information confirms the tactical and coordinative nature of her position. Each assignment is a directive to carry out specific day-to-day operational responsibilities within the three program areas assigned to Ms. Spencer.

In her PDQ, Ms. Spencer suggested other options for reclassification at a Manager level but, again, per our analysis, her position does not rise to the level of a manager as her assignments lack in the strategic and financial impact that typical manager positions have. In addition, Ms. Spencer reports to a Supervisor who, in turn, reports to a Manager-level, a hierarchy that places strategic and financial responsibilities at the Supervisor and Manager levels. A Manager title/classification does not appear appropriate for Ms. Spencer's position.

Recommendation

No change to Ms. Spencer's classification of Aviation Assistant Marketing and Commercial Representative.

We want to thank the Port of Oakland for its time and cooperation in bringing this study to a successful conclusion. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report of our analysis, findings, and recommendations.

Respectfully Submitted by
Koff & Associates

Georg S. Krammer
Chief Executive Officer

Exhibit 1B

Lakita Spencer

From: Lakita Spencer
Sent: Tuesday, July 18, 2017 3:33 PM
To: 'Georg Krammer'
Subject: Position Review

Georg,

Thank you for meeting with me to review my position in the Aviation Marketing department this morning.

I hope that I have achieved the following objectives in our meeting:

- Answered your questions to your satisfaction.
- Provided you with clarification regarding my current position.
- Supplied an adequate overview of the customer programs I manage, and there level of importance as it relates to OAK's ability to influence travelers and enhance the passenger experience.
- Lastly, I hope that I have conveyed my reasons for why I requested my classification be evaluated.

This is my first time conducting a desk audit. If there are any areas you need further clarification on after speaking with my supervisor and colleagues, please feel free to contact me prior to submitting the final report to the Port.

Regards,

Lakita Spencer
Visitor Information Services Program Coordinator
Oakland International Airport
9532 Earhart Road, Suite 205
Oakland, California 94621
Office: (510) 563-2846 Cell: (510) 394-4740
www.oaklandairport.com



Lakita Spencer

From: Lakita Spencer
Sent: Tuesday, July 25, 2017 4:44 PM
To: 'Georg Krammer'
Subject: Position Review: Lakita Spencer
Attachments: 20170725160042122.pdf

Hello Georg,

I have compiled the attached documents to provide some historical context to my position and request to have my position reclassified.

Included in these attachments:

- Information about the history regarding my classification.
- The program goals prior to my onboarding as a permanent staff member which I believe you will see is drastically different from my work today and for many prior years. The position was written for a staff member that was a contract employee and a number of the functions were being done by a volunteer who is now deceased.
- The original volunteer roster which includes the # of those volunteers currently active, retired or deceased. I think this is an important factor since the team I inherited and the team I supervise now is vastly different. Also, there are a number of variables that contributed to the exit of these volunteers including them aging out of the program during the same time span.

I would like it noted that in the first attached document between Port HR & the previous Marketing Manager who hired me that my position is not "entry level" . It was also stated that my position may have been misclassified in the Aviation Marketing & Commercial Rep series and that it may have warranted a higher classification within the series.

Thank you again for your time and reviewing my position.

Regards,

Lakita Spencer

Manage OAK's VIP Volunteers**Due Date:** 6/1/2005**Weight:** 25%**Description:**

Manage the Oakland International Airport Visitor Information Program (VIP) volunteers. Train, schedule, and supervise the Airport's staff of volunteers.

Measurement:

Conduct quarterly continuing training sessions for the Airport's volunteers to keep them abreast of developments at the airport and changes in policy of the program. Prepare and distribute schedules for Airport volunteers in a timely fashion. Track reported time for each volunteer, and coordinate payment for meal stipends, uniform reimbursements, and "extra duty" payments.

Conduct Disaster Training**Due Date:** 5/1/2005**Weight:** 10%**Description:**

Improve the Visitor Information Program Volunteers' ability to aid travelers and families during a disaster involving Oakland International Airport.

Measurement:

Conduct two (2) disaster training sessions with volunteers. Include Red Cross, Airport Operations, and relevant stakeholders to optimize the "Meeters & Greeters" component of OAK's Disaster Response Plan.

Internal Customer Care**Due Date:** 5/1/2005**Weight:** 10%**Description:**

Plan and execute at least two (2) events to show appreciation to the volunteers who staff the Visitor Information Centers. Include Port staff and tenants, to acquaint them with the volunteers themselves and their various roles in providing services to our mutual customers. Plan and organize the airport's first official Volunteer Day with input from the volunteers.

Measurement:

Produce the two (2) events as described and make a report on the results. Present any invitations or artwork that is produced for the events.

Professional Development**Due Date:** 5/1/2005**Weight:** 10%**Description:**

Enroll in the Association for Volunteer Administration's (AVA) Credentialing Program, and obtain a "Certified in Volunteer Administration" (CVA) credential. Additionally, attend at least one (1) training, conference or seminar this year to increase skillsets in volunteer management, data base and spreadsheet programs, writing, and communications.

Measurement:

Complete the necessary requirements and graduate the courses. Present an AVA Volunteer Administration, and proof of completion of at least one additional training course.

Volunteer Recruitment**Due Date:** 5/1/2005**Weight:** 25%**Description:**

Create and print a new recruitment brochure for 2004-2005 that includes decent requirements, responsibilities, benefits, and expectations for the volunteer and the VIP program. Search out alternative groups like the Retired Teachers Association for new recruitment potential. Update the listing of all senior centers and similar facilities and develop a mailing list. Advertise in the PSA section of regional newspapers and recruit at local Port festivals/events. Evaluate, qualify and train 20 new volunteers.

Measurement:

Print and regionally distribute the new solicitation brochure using the updated mailing list. List should include at least three major alternative groups as previously mentioned. Evaluate, qualify and train 20 new volunteers.

Volunteer Care**Due Date:** 1/1/2005**Weight:** 5%**Description:**

Research and develop a way to respond with an appropriate level of compassion to volunteers in their time of need, i.e. illness, death, hospital stay. This can be as simple as sending a card or flowers, or making a visit to the hospital.

Measurement:

Present a plan that includes appropriate levels of response and a budget.

Integrate Computers at VIP Booths**Due Date:** 9/15/2004**Weight:** 5%**Description:**

Integrate the use of new computer terminals located in the Visitor Information Booths of Terminal 1 and Terminal 2 to improve Volunteer's access to Airport information, driving directions, and other information that will assist the traveler. Ensure that any training conforms with the Port's computer use policies.

Measurement:

Develop a training module for new Volunteers on the use of computers at the Visitor Information Booths. Include training at least one Volunteer Staff Meeting.

Visitor Information Program Evaluation**Due Date:** 8/1/2004**Weight:** 10%**Description:**

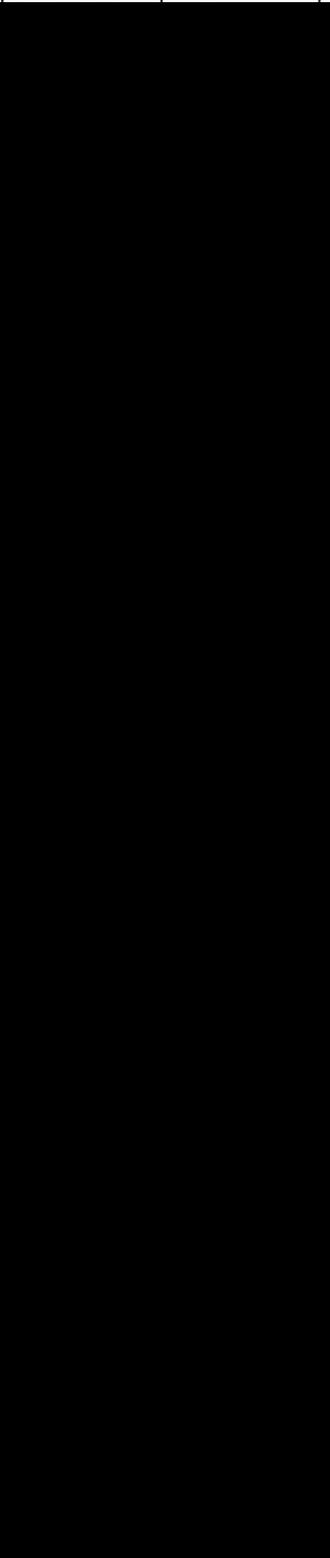
Create a process that evaluates the success of OAK's Visitor Information Program on a monthly basis. This process should include observing operations at the booth at least once-monthly during each shift and documenting any strengths, weaknesses, or requirements for improvement of the program, and any observations about passenger experiences & impacts. Share observations about passenger experiences with relevant Airport Operations Departments.

Measurement:

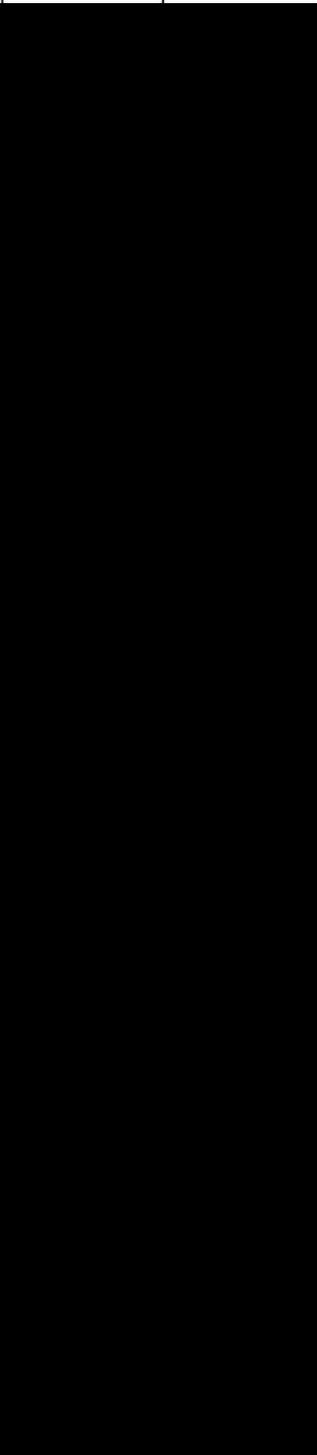
Prepare a monthly report with cover memo that includes program statistics (e.g. contacts, hours, number of volunteers, etc.), observations from time at Visitor Information Booth regarding the Visitor Information Program, and Passenger experiences & impacts.

LastName	FirstName	Current Status	Comments/Exit Notes
		Retired	Office support team; Annual Appreciation Support
		Retired	Computer Based Testing / Program Requirements
		Deceased	Built & Administered Reimbursement Access Database; Managed monthly schedule; Lead of office support team during my onboarding as Volunteer Program Coordinator.
		Retired	Computer Based Testing / Program Requirements
		Terminated	Computer Based Testing / Program Requirements
		Retired	Computer Based Testing / Program Requirements
		Active	Implemented ADA regulations that have allowed Charlie to remain in the program despite management discrimination to age out season volunteers.
		Retired	
		Deceased	Retired due to medical complications. Was the first volunteer to participate in the program for 30 years.
		Retired	Computer Based Testing / Program Requirements
		Terminated	Computer Based Testing / Program Requirements
		Retired: Medical	Computer Based Testing / Program Requirements
		Deceased	Computer Based Testing / Program Requirements
		Retired	Computer Based Testing / Program Requirements
		Retired: Medical	
Active			

LastName	FirstName	Current Status	Comments/Exit Notes
		Deceased	
		Retired	
		Retired:Medical	
		Deceased	
		Retired	Computer Based Testing / Program Requirements
		Deceased	Computer Based Testing / Program Requirements
		Retired	
		Deceased	
		Deceased	
		Terminated	Computer Based Testing / Program Requirements
		Retired: Medical	
		Deceased	
		Retired	
		Active	
		Retired	
		Retired: Medical	

LastName	FirstName	Current Status	Comments/Exit Notes
		Retired	
		Active	
		Retired	
		Terminated	Computer Based Testing / Program Requirements
		Retired	Computer Based Testing / Program Requirements
		Retired:Medical	
		Retired: Medical	
		Retired	
		Retired: Medical	Computer Based Testing / Program Requirements
		Active	
		Retired	Computer Based Testing / Program Requirements
		Retired: Medical	
		Terminated	Program Requirements
		Active	
		Active	
		Retired	Program Requirements

LastName	FirstName	Current Status	Comments/Exit Notes
[REDACTED]		Retired	Program Requirements
		Active	
		Retired	
		Retired	
		Retired	
		Deceased	
		Deceased	
		Active	
		Terminated	
		Retired	
		Retired	Computer Based Testing / Program Requirements
		Active	
		Retired	
		Terminated	
		Retired	
		Deceased	

LastName	FirstName	Current Status	Comments/Exit Notes
		Retired	
		Retired	Computer Based Testing / Program Requirements
		Deceased	
		Retired	
		Active	
		Retired: Medical	
		Retired	
		Retired	Computer Based Testing / Program Requirements
		Active	
		Retired: Medical	Program Requirements
		Retired	
		Retired: Medical	
		Retired: Medical	
		Retired	Program Requirements
		Retired	Program Requirements

From: "Philip" <pjeppie@myway.com>
To: <jhollowa@portoakland.com>, <pjeppie@myway.com>
Date: 11/15/2005 3:50:45 AM
Subject: RE: Volunteer Schedule

[Phillip Epstein] * SEE NOTE ON ORIGINAL ROSTER

This volunteer housed the reimbursement database and completed this function.

Joanne, I must have gotten back to you too late on Monday .. I will be able to assist you by phone from my home Tuesday morning anytime after 8am. The December schedule draft is ready to work on although it is not up to date 100%. What I do each month is make a copy of the assignments for the previous month, modify the days of the next month, then save that frame for the new month in her MY DOCUMENTS folder as an excel file. Marci then takes that as the starting point to update for vacations, shift changes etc for the draft. She has been gone so long that the file called SchDec05 will have some blanks in places some volunteers expect to see their name. I think that they will understand and re-contact with their preferences if we ask them to do so. My suggestion is to print the 6 pages showing the schedule at Terminal 1, 2nd Person, Terminal 2, 2nd Person, Roving Ambassador, and IFLYOAK as is. I suggest you highlight the calendar portion of each sheet and print the selection separately. Add a cover page to explain something like this: Dear volunteers Since Marci continues to be under the weather, I am sending out this draft schedule for December. Please examine the calendar carefully as I am unable to know what each of you might expect for the month. Leave a message at 563-2846 if your name is left off any date(s) and time(s) that you regularly work so that the FINAL schedule can be as full and correct as possible. Some of you may be away for vacations or unavailable on dates your name is on the draft. Others may have time to be on duty extra shifts. Make your wishes known, and Phil and I will make the adjustments on the FINAL schedule due to be released in ten days. JH We have been copying the schedule as two sided pages to reduce the mailing costs once each sheet is printed. Now for the mailing labels and envelopes: A mailing takes 4 pages of labels. The labels are ready to prepare using the ACCESS database under her MY DOCUMENTS (File is called OakVol2005A). I am able to come in mid-day Wednesday to do this for you. I could also ask one of the other volunteers, Lloyd Baysdorfer, who is familiar with the process to come in. When we talk on Tuesday, we can settle that part of the job. Phil 3:46am 11/15/2005--- On Mon 11/14, Joanne Holloway < jhollowa@portoakland.com > wrote: From: Joanne Holloway [mailto: jhollowa@portoakland.com] To: pjeppie@myway.com Cc: cminner@portoakland.com Date: Mon, 14 Nov 2005 14:07:12 -0800 Subject: Volunteer Schedule Hi Phil, I spoke with Marci about getting the schedule out. She said it usually goes out on the 15th of each month and you may be able to give me some guidance. Can you give me a call and help me through it? I'm at 563-2840. Thanks Phil. Joanne

No banners. No pop-ups. No kidding.
Make My Way your home on the Web - <http://www.myway.com>

CC: <cminner@portoakland.com>



PORT OF OAKLAND

November 27, 2006

Dear Volunteers,

As some of you know, Marci White our Volunteer Coordinator of many years has decided to retire from the Port of Oakland. Marci did an outstanding job of growing our program to meet the needs of Oakland travelers. In just six years, she increased our ranks from just 30 active volunteers to more than 100 today. Marci's kindness and concern for the program and the dedicated people who give their time to help visitors to our airport has been an inspiration. We will all truly miss her, and we wish her the very best in her retirement.

For six months, we all had the opportunity to work with Lakita Logan who did a fantastic job of filling in during Marci's absence. Unfortunately, the Port's requirements for temporary help strictly limit the amount of time any one person can fill a temporary position in any given year. With your help, Lakita very quickly learned the ropes of the program. During her short time here, she made many meaningful long-term contributions to the organization. I am grateful to you for helping Lakita run the program so effectively.

I have initiated the process to recruit a new permanent Volunteer Coordinator for our program, and I anticipate that the Port will advertise the open position within the next few weeks. In the meantime, I have also requested a temporary help employee to assist with running the program until a person can be appointed permanently.

I am looking forward to seeing you at Scott's for our Annual Volunteer Appreciation Luncheon on Thursday, December 14. Check-in begins at 11:30 am.

Yours,

A handwritten signature in black ink, appearing to read "Chris", written in a cursive style.

Christopher D. Minner

Aviation Marketing & Communications Manager

May 5, 2006

Oakland International Airport Volunteers

Subject: Marci Update / Terminal 2 Baggage Claim Activation

Dear Airport Volunteers,

I sincerely thank you for your kind support of Marci and the Oakland International Airport Visitor Information Program, especially during the last several months. I am sorry to say that Marci anticipates being out of the office for a while longer. I have seen her recently, and she's doing much better.

While Marci is away, we are very fortunate to have Ms. Lakita Logan stepping in to help with administration. Ms Logan has a background in volunteer administration. You'll soon see for your self that she's bright, articulate, and full of energy. Most importantly, she's personally committed to maintaining the success of the Visitor Information Program.

This is an exciting time at the Airport, as we prepare to open the new Terminal 2 Baggage Claim. I invite you to attend the Terminal 2 dedication ceremony to be held on Tuesday, May 16, 2006 at 10:00am. I encourage you to take this outstanding opportunity to experience and familiarize yourself with the new building before it goes into operation. Soon, you will receive another mailing with facility details, a map, and a list of Frequently Asked Questions.

The opening of the new facility for passenger operations is scheduled for late May. We will begin moving materials into our new booth as soon as it is ready. Our plan is to have a seamless transition, with all our brochures, supplies and a functional computer workstation on opening day.

The opening of the new facility creates a special volunteering opportunity. Throughout the first days of operation, the Airport is requesting to have two Roving Ambassadors stationed in the Terminal 2 concourse to assist passengers

by helping direct them to the new baggage claim. If you are interested in this special assignment, please contact Lakita at 563-2846.

Again, on behalf of the rest of the Oakland International Airport Team and our passengers, thank you so very much for continuing your support of the Airport and our Visitor Information Program. Now, more than ever, the 14.5 million people who fly through Oakland International Airport each year rely on our Volunteers to make each trip a success.

Sincerely yours,

Christopher Minner
Aviation Marketing & Communications

Exhibit 1C

Exhibit 1C: Work Plan Overview (Fiscal Years 2014 & 2015)

*FY 14- 15 Work Plan Tool used to track work. Overview does not include all action steps taken.

Lakita Spencer

Objectives:

- Manage OAK volunteer and customer relation programs.
- Ensure volunteers serve as the primary and front communication centers for OAK travelers.
- Ensure volunteers act a front line customer service option to attract, win and retain existing customers.
- Provide back-up support and information for airline, ground transportation companies, concessionaries, contract companies such as LAZ parking and more.
- Model our ability to implement customer service brand values of Kindness, Community and Integrity.

Customer Service and Terminal Experience

1. Coordinate Volunteer Information Program

- Enhance quality of airport way finding, ground transportation and local attraction information provided to airport customers.
- Ensure volunteer compliance with volunteer appearance guidelines and uniform policy.
- Implement plan for T1 booth renovation.
- Evaluate structure of the volunteer selection process.
- Enforce Two year volunteer terms to allow new volunteer opportunities to more individuals while simultaneously increasing the level of service.

Priority	Low
Estimated Cost	\$90,000 (Volunteer stipends and supplies)
Assigned Staff	Lakita
Estimated Completion Date	ongoing

Action steps taken to meet goals	Anticipated Completed date
Provide quarterly volunteer program guide updates	Ongoing
Provide orientation refresher courses	8/25/14, 2/1/15
Distribute updated volunteer program handbook	12/31/14
Redesign Airport Way Finding Maps	11/1/14
Update and reprint ground transportation brochures in English, Spanish, Norwegian & Swedish	1/1/15

2. Tunes in Terminal Live Performance Program

- Refine performer selection, advertising and audition process to produce a continual improvement in performer quality.
- Develop and implement procedures for related terminal signage and notifications, including featuring schedule of performances in social media sites and employee communications.

Priority	Low
Estimated Cost	\$0 (included above)
Assigned Staff	Lakita
Estimated Completion Date	ongoing

Action steps taken to meet goals	Anticipated Completed date

3. Customer Survey Data Collection and Reporting

- Develop and execute plan for further training and recruitment of volunteer interviewers
- Report out results of international arriving passenger survey
- Assess need for additional surveys on specific areas of interest (i.e. concessions, parking, etc.)

Priority	Medium
Estimated Cost	\$30,000
Assigned Staff	Lakita, Brian
Estimated Completion Date	ongoing

Action steps taken to meet goals	Anticipated Completed date
Conducted new volunteer orientation	8/25/14
Share international survey feedback at Norwegian retention meetings	8/22/14, Ongoing

1. Enhance Volunteer Program-Continued for FY 13-14

- Evaluate technology options to enhance the distribution of visitor information.

Priority	Medium
Estimated Cost	\$0
Assigned Staff	Lakita
Estimated Completion Date	03/31/2015

Action steps taken to meet goals	Anticipated Completed date
Update website and add volunteer position descriptions	9/4/14
Ensured printing capability is available for all volunteer workstations	8/21/14
Make necessary database upgrades to administration process to track volunteer records and services required to process reimbursements.	11/1/14

New Initiatives

1. Change booth location in Terminal 1

Priority	Medium
Estimated Cost	\$10,000 (or covered by Clear Channel contract)
Assigned Staff	Lakita
Estimated Completion Date	03/31/2015

Action steps taken to meet goals	Anticipated Completed date
Contact Joan Zatopek to confirm implementation plan.	

2. Increase volunteer oversight

- Increase scheduled and unscheduled booth visits by coordinator
- Training, coaching, recruitment for specific skills and abilities, including minimum qualifications and enhanced selection process
- Limit initial volunteer term length to two years, with renewal possible following assessment and interview
- Refine and execute dress code and appearance standards; assess need for uniform renewal

Priority	High
Estimated Cost	\$
Assigned Staff	Lakita
Estimated Completion Date	07/01/2014 (and ongoing in FY15)

Action steps taken to meet goals	Anticipated Completed date
Conducted 3-4 booth visits weekly	Ongoing
Revised Volunteer Program Handbook	8/27/14
Distribute revised handbook to volunteers at VIP staff meeting	9/25/14

3. Implement and train volunteers to 100% usage of online comment database

Priority	High
Estimated Cost	\$0
Assigned Staff	Lakita
Estimated Completion Date	10/01/2014

Action steps taken to meet goals	Anticipated Completed date
Provided training & review	6/19/14
Distributed step by step instruction to each volunteer	6/19/14
Currently providing one on one training	Ongoing
Print weekly report to evaluate volunteer usage and quality of inputted data	Ongoing

4. Execute two in-terminal special events to enhance terminal experience

- Examples: hula dancers, fashion show, Oakland School for the Arts performances, A. C. T. performances

Priority	Low
Estimated Cost	\$10,000
Assigned Staff	All
Estimated Completion Date	Ongoing in FY15

Exhibit 1D

Volunteer Schedule OAK Airport Buskers Program March 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Feb 25 11:00am - 2:00pm Terminal 2 Meet n Greet Area Nguyen 2:00pm - 5:00pm Terminal 1 Meet and Greet Area Regan, James 4:00pm - 6:00pm Terminal 2 Meet n Greet Area Oaktown Jazz Workshops 6:00pm - 10:00pm Terminal 1 Meet and Greet Area Bierre, Pierre	Feb 26 11:00am - 3:00pm Terminal 2 Meet n Greet Area Cutler, Jack 3:00pm - 6:00pm Terminal 1 Meet and Greet Area Regan, James 6:00pm - 10:00pm Terminal 2 Meet n Greet Area EACHDRAIDH	Feb 27 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone 11:00pm - 2:00pm Terminal 2 Meet n Greet Area Tuttle, John	Feb 28 11:00am - 2:00pm Terminal 2 Meet n Greet Area Bruce Brill 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Tuttle, John	1 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	2 9:00am - 12:00pm Terminal 2 Meet n Greet Area Blythe Davis 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage 4:00pm - 6:00pm Terminal 1 Meet and Greet Area Brown, Emily 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Tuttle, John	3 1:00pm - 5:00pm Terminal 2 Meet n Greet Area Nguyen
4 11:00am - 2:00pm Terminal 2 Meet n Greet Area Nguyen 3:00pm - 7:00pm Terminal 2 Meet n Greet Area Bierre, Pierre 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James	5 11:00am - 2:00pm Terminal 2 Meet n Greet Area Cutler, Jack 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James 6:00pm - 10:00pm Terminal 2 Meet n Greet Area EACHDRAIDH	6 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone 11:00pm - 2:00pm Terminal 2 Meet n Greet Area Tuttle, John	7 11:00am - 2:00pm Terminal 2 Meet n Greet Area Bruce Brill 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Tuttle, John 6:00pm - 10:00pm Terminal 2 Meet n Greet Area Cutler, Jack	8 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	9 9:00am - 12:00pm Terminal 2 Meet n Greet Area Blythe Davis 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone	10 1:00pm - 5:00pm Terminal 2 Meet n Greet Area Nguyen
11 11:00am - 2:00pm Terminal 2 Meet n Greet Area Nguyen 3:00pm - 7:00pm Terminal 2 Meet n Greet Area Bierre, Pierre 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James	12 11:00am - 2:00pm Terminal 2 Meet n Greet Area Cutler, Jack 3:00pm - 7:00pm Terminal 2 Meet n Greet Area Regan, James 6:00pm - 10:00pm Terminal 2 Meet n Greet Area EACHDRAIDH	13 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone 11:00pm - 2:00pm Terminal 2 Meet n Greet Area Tuttle, John	14 11:00am - 2:00pm Terminal 2 Meet n Greet Area Bruce Brill 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Tuttle, John	15 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	16 9:00am - 12:00pm Terminal 2 Meet n Greet Area Blythe Davis 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone	17 1:00pm - 5:00pm Terminal 2 Meet n Greet Area Nguyen
18 11:00am - 2:00pm Terminal 2 Meet n Greet Area Nguyen 3:00pm - 7:00pm Terminal 2 Meet n Greet Area Bierre, Pierre 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James	19 11:00am - 2:00pm Terminal 2 Meet n Greet Area Cutler, Jack 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James 6:00pm - 10:00pm Terminal 2 Meet n Greet Area EACHDRAIDH	20 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone 11:00pm - 2:00pm Terminal 2 Meet n Greet Area Tuttle, John	21 11:00am - 2:00pm Terminal 2 Meet n Greet Area Bruce Brill 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Tuttle, John	22 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	23 9:00am - 12:00pm Terminal 2 Meet n Greet Area Blythe Davis 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone	24 1:00pm - 5:00pm Terminal 2 Meet n Greet Area Nguyen
25 11:00am - 2:00pm Terminal 2 Meet n Greet Area Nguyen 3:00pm - 7:00pm Terminal 2 Meet n Greet Area Bierre, Pierre	26 11:00am - 2:00pm Terminal 2 Meet n Greet Area Cutler, Jack 3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James	27 5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone 11:00pm - 2:00pm Terminal 2 Meet n Greet Area Tuttle, John	28 11:00am - 2:00pm Terminal 2 Meet n Greet Area Bruce Brill 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Tuttle, John	29 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	30 9:00am - 12:00pm Terminal 2 Meet n Greet Area Blythe Davis 12:00pm - 2:00pm Terminal 2 Meet n Greet Area Ukulenny 2:00pm - 5:00pm Terminal 2 Meet n Greet Area Courage	31 1:00pm - 5:00pm Terminal 2 Meet n Greet Area Nguyen

3:00pm - 7:00pm Terminal 1 Meet and Greet Area Regan, James	6:00pm - 10:00pm Terminal 2 Meet n Greet Area EACHDRAIDH				5:00pm - 9:00pm Terminal 2 Meet n Greet Area Navarone
4:00pm - 6:00pm Terminal 2 Meet n Greet Area Oaktown Jazz Workshops					

03-13-2018 10:30 am

Close this window

Lakita Spencer

From: Jack Cutter <jack@jackcutter.com>
Sent: Friday, March 16, 2018 6:45 PM
To: Lakita Spencer
Subject: OAK April music

Hi Lakita -

Can we look at booking in the following slots?

Mon Apr 02 11-6 open (1-5 or 2-6 preferred ~~ 11am-3pm OK)
Mon Apr 09 (no slot listed on web) (1-5 or 2-6 preferred ~~ 11am-3pm OK)
Mon Apr 16 11-6 open (1-5 or 2-6 preferred ~~ 11am-3pm OK)
Mon Apr 23 11-6 open (1-5 or 2-6 preferred ~~ 11am-3pm OK)
Mon Apr 30 11-6 open (1-5 or 2-6 preferred ~~ 11am-3pm OK)

I am finding that tips start coming in after 1PM. If a 1 - 5 slot is workable, that would be great. 2-6 would also work; however, I would have to start breaking down at 5:45 for your 6pm artist. 11-3 is also OK if that is necessary for your scheduling.

Thanks
-Jack



Jack Cutter - Acoustic Guitarist

www.jackcutter.com

650 520 0900

~~~~~

## Lakita Spencer

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**From:** Joanne Holloway  
**Sent:** Friday, December 10, 2010 8:58 AM  
**To:** Tony Glaser  
**Cc:** Arthur Whitmore; Douglas Mansel; Lakita Spencer; Arthur Whitmore  
**Subject:** RE: Oakland International Airport Buskers Program

Hi Tony,

Thank you for being in touch with us. I also got your phone message from yesterday. We are anxious to hear your music and have you come on board as part of our Buskers Program.

As a public agency, there are some things we need to do to bring you on, and I have copied this to our security manager who can tell us about badging for you, and to our Volunteer Coordinator since you would be a part of our volunteer program. I don't believe we will be ready to bring you on by this Sunday, but possibly Dec. 14. Our Operations Manager has suggested you start by playing in our baggage claim area, but we can discuss specifics once we hear from security and the volunteer program about what we need to do to get you on and ready.

I look forward to speaking with you and meeting you. I'll be in touch by phone a little later this morning.

Joanne

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**From:** anthonyglaser@gmail.com [mailto:anthonyglaser@gmail.com] **On Behalf Of** Tony Glaser  
**Sent:** Wednesday, December 08, 2010 1:32 AM  
**To:** Joanne Holloway  
**Subject:** Re: Oakland International Airport Buskers Program

Hi Joanne,

First, I apologize for taking this long to get back to you. We have been non-stop busy gearing up for our headlining show at Yoshi's SF this coming Monday, upcoming recording session, and an international tour to Bali and Australia, so sometimes these emails slip through the cracks.

We are still interested in sharing our music with the travelers coming through, we were actually just talking about it a couple days ago. We have a some days and windows here and there this month that we'd like to come and entertain the holiday crowds flying in and out. Our music is for everyone, young and old, and is family-friendly.

Please let me know what days and times you have available and hopefully we can set something up. Dates this month that we can make work include the 12th, 14th, 17th, 21st, 22nd, and 23rd.

Thanks!  
Tony

---

*Tony Glaser*  
*Alma Desnuda*  
858.699.8669

[www.almaDmusic.com](http://www.almaDmusic.com)  
[tony@almaDmusic.com](mailto:tony@almaDmusic.com)

On Wed, Nov 17, 2010 at 3:34 PM, Joanne Holloway <[JHolloway@portoakland.com](mailto:JHolloway@portoakland.com)> wrote:

Hello:

The Oakland International Airport is implementing a Performance Arts Program that is starting with Buskers. I got your name from someone who saw you perform and who works at the airport and then told me to contact you regarding your possible participation on our program.

Because we are a public agency, we do have policies in place for the program, but if you are looking for some public exposure, I think you'll be a good fit for our program though we will ask you to audition.

If you're interested, and would like to meet with us, please give me a call or just respond to this email and we'll get the process rolling. All the best to you.

Joanne Holloway

Oakland International Airport

[jholloway@portoakland.com](mailto:jholloway@portoakland.com)

510.563.2840

## Lakita Spencer

---

**From:** Rosemary Barnes  
**Sent:** Friday, February 17, 2012 11:41 AM  
**To:** Joanne Holloway; Lakita Spencer  
**Subject:** Buskers Yesterday

Hi - our friend David Likuski shared the performance on OAK's Facebook yesterday.

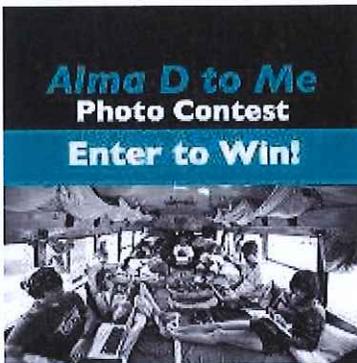
Rosemary



### [David Likuski](#)

This afternoon, Southwest Airlines passengers and OAK employees were treated to the sounds of local band Alma Desnuda (Naked Soul) in the SWA baggage claim area, as part of the OAK's new "busker"-musician event. The band members were great, with their catchy tunes and ongoing enthusiasm.

<https://www.facebook.com/almadesnudamusic>



### [Alma Desnuda](#)

Alma Desnuda (Spanish for "Naked Soul") from San Francisco Bay Area, is best known for their captivating harmonies, rhythmic grooves, and inspiring lyrics. Often described as California Acoustic Soul (a mix between Jack Johnson, Sublime and the Beatles), they were dubbed by ABC News, "A fun-loving bunch who bring a col...[See More](#)

Page: 4,878 like this

LikeUnlike · [Share](#) · 14 hours ago

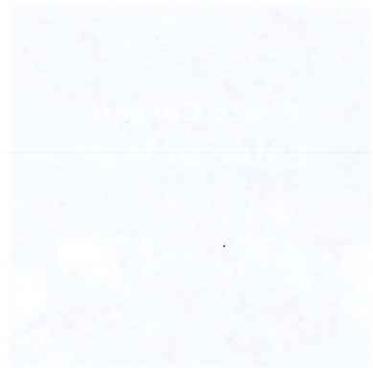
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[Oakland International Airport](#) David thank you so much for connecting us with these wonderful artists. Everyone enjoyed the performance. The first of many more to come!

Rosemary Barnes  
Media Relations/Marketing  
Oakland International Airport  
[rbarnes@portoakland.com](mailto:rbarnes@portoakland.com)  
510-563-2892  
[www.oaklandairport.com](http://www.oaklandairport.com)

**I  OAK**  
**Park Close. Fly on time.**



## Lakita Spencer

---

**From:** Joanne Holloway  
**Sent:** Monday, March 25, 2013 2:03 PM  
**To:** Boo, Rolando; Lakita Spencer  
**Subject:** RE: Possible scheduling conflict with Paul Fontes

Hi Rolando,

Lakita is out of the office until tomorrow morning, but I am sure she will update the calendar. While we've been transitioning the program, we've stumbled upon some duplications, but we're getting it all together now. Thanks very much for calling this to our attention.

Also, keep in mind that we schedule week to week and slots are not promised to any performer. I know Mr. Fontes likes certain days and times, but we are operating on a week to week schedule with first come, first served.

Joanne

---

**From:** Boo, Rolando [mailto:Rolando.Boo@hmshost.com]  
**Sent:** Monday, March 25, 2013 1:58 PM  
**To:** Lakita Spencer  
**Cc:** Joanne Holloway  
**Subject:** Possible scheduling conflict with Paul Fontes

Hi Lakita,

I just want to make sure that Mr. Paul Fontes will not be playing this coming Friday since Navarone is scheduled. The reason why I bring this up is because the posted schedule on the online Volunteer Calendar shows Navarone as the scheduled performer last Thurs and Friday ( March 21<sup>st</sup> and 22<sup>nd</sup> ) during the peak 4 – 8 pm slot. Instead, he performed from 7 am to 11 am on both days while Mr. Fontes played his usual schedule of 4 pm to 8 pm on both nights although the calendar does not reflect it.

Mr. Fontes is usually here every Thurs and Fri evenings and may be accustomed to working that shift exclusively. To prevent an awkward situation from arising this Friday, I just wanted to make sure that all parties have been notified.

Thank you,  
Rolando Boo

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## Lakita Spencer

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**Subject:** FW: Navarone

**From:** Lakita Spencer  
**Sent:** Friday, March 22, 2013 12:13 PM  
**To:** Boo, Rolando  
**Cc:** Joanne Holloway; Brian Kidd  
**Subject:** RE: Navarone

Rolando,

Navarone has been set-up in the online scheduling system and is scheduled for March 29th. You will be receiving an email from me with your password to utilize this scheduling program. I will mail his parking vouchers on Monday. I have added your email address for now and you will receive all correspondence. If Navarone has an email address please send it to me and I will update his records. You receive a reminder on the 25th of each month he is scheduled to perform moving forward. Thank you again and look forward to meeting Navarone soon.

Regards,

Lakita

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**From:** Boo, Rolando [<mailto:Rolando.Boo@hmshost.com>]  
**Sent:** Friday, March 22, 2013 9:03 AM  
**To:** Joanne Holloway  
**Cc:** Lakita Spencer; Brian Kidd  
**Subject:** Re: Navarone

Yes, that time frame works perfectly... Thanks so much.

Rolando Boo  
Retail Operations Mgr  
Oakland Int'l Airport  
510 326 0340

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**From:** Boo, Rolando  
**Sent:** Friday, March 22, 2013 11:59 AM  
**To:** 'jholloway@portoakland.com' <[jholloway@portoakland.com](mailto:jholloway@portoakland.com)>  
**Cc:** 'llogan@portoakland.com' <[llogan@portoakland.com](mailto:llogan@portoakland.com)>; 'bkidd@portoakland.com' <[bkidd@portoakland.com](mailto:bkidd@portoakland.com)>  
**Subject:** Re: Navarone

Thank you, Lakita...

Rolando Boo  
Retail Operations Mgr  
Oakland Int'l Airport  
510 326 0340

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**From:** Joanne Holloway [<mailto:jholloway@portoakland.com>]  
**Sent:** Friday, March 22, 2013 11:20 AM  
**To:** Boo, Rolando  
**Cc:** Lakita Spencer <[llogan@portoakland.com](mailto:llogan@portoakland.com)>; Brian Kidd <[bkidd@portoakland.com](mailto:bkidd@portoakland.com)>

**Subject:** RE: Navarone

Hi Rolando,

Lakita can schedule Navarone in for next Friday, March 29. How is early evening - 5:00 till 9:00 in Terminal 2?

You can now work with Lakita on further schedules, she's even setting the program up in an online format so you will be able to schedule the performance dates and times yourself!

Again, it was a pleasure meeting both of you and an amazing pleasure listening to Navarone's music.

All the best to you both.

Joanne

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**From:** Boo, Rolando [<mailto:Rolando.Boo@hmshost.com>]

**Sent:** Friday, March 22, 2013 7:12 AM

**To:** Joanne Holloway

**Subject:** Re: Navarone

Joanne,

Navarone would love to play again next week. Would it be possible to squeeze him in next Friday? If you could get him an evening slot, great. If not, a morning or afternoon slot would be fine.

Once school starts, he's interested in playing 1 Sunday per month - whatever time and even rotating between terminals would be fun. This is something he can commit to and is not so often where it will become boring.

I appreciate you giving him this opportunity. Since his playing is inspired by audience interaction, I look forward to how this experience inspires his playing over the next several months.

Kind regards,

Rolando Boo  
Retail Operations Mgr  
Oakland Int'l Airport  
510 326 0340

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**From:** Joanne Holloway [<mailto:jholloway@portoakland.com>]

**Sent:** Wednesday, March 20, 2013 04:25 PM

**To:** Boo, Rolando

**Subject:** RE: Navarone

You don't know how happy this makes me!!!! We will find space and time for him whenever he wants to be here. Please tell me what days and what time and I will make it happen.

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**From:** Boo, Rolando [<mailto:Rolando.Boo@hmshost.com>]

**Sent:** Wednesday, March 20, 2013 1:26 PM

**To:** Joanne Holloway

**Subject:** Re: Navarone

Joanne,

OMG!!! I had so many Southwest, TSA, and Port of Oakland employees come up to me and say wow! And as far as

passengers, let's just say that his tip jar was packed - there were a number of 5's, 10's, and even a 20????

I cannot thank you enough... My son is so grateful for this opportunity. if you can find room for him next week, he is still on Spring Break. He is available Sundays as well.

Looking forward to meeting you.

Rolando Boo  
Retail Operations Mgr  
Oakland Int'l Airport  
510 326 0340

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**From:** Joanne Holloway [<mailto:jholloway@portoakland.com>]  
**Sent:** Wednesday, March 20, 2013 03:49 PM  
**To:** Boo, Rolando  
**Subject:** Navarone

Hi Rolando,

I tried to get to the terminal to hear Navarone, but work got in the way. I just went to the Info Booth and the volunteer told me the first shift could not say enough great things about him. She said they told her he "brought joy to our customers". I am so happy and will make every effort to go over and meet him tomorrow.

I hope he was pleased with his first day and hope he will join us again.

Joanne

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## Lakita Spencer

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**From:** Joanne Holloway  
**Sent:** Friday, March 22, 2013 4:23 PM  
**To:** Lakita Spencer  
**Subject:** Performing Arts Filming

When we both have time next week, let's discuss filming and photography for the performing arts program. We're getting more and more requests, and there's a huge policy we need to review. Hopefully we can make it happen.



## Lakita Spencer

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**From:** Joanne Holloway  
**Sent:** Tuesday, December 14, 2010 11:39 AM  
**To:** John Albrecht; Rosemary Barnes; Lakita Spencer  
**Subject:** New CS Program Intro  
**Attachments:** New CS Program Intro.doc

The new Customer Service Wall is being installed tomorrow, Dec. 15. We have our materials to get the program started - the "Back to our roots" booklet and the suggestion cards. I will work with one of the volunteers, Joyce Reddick, who will monitor the cards and booklets for me every Monday and Thursday. I will stock and post everything we receive every Wednesday and Friday.

I have written the attached letter of intro I want to send to Aviaiton-Division managers and supervisors and to airline station managers. Will you please review the letter for me and provide any language or content changes you think may make the letter more effective. I would like to get this out by Thursday morning. You already know how much I appreciate your assistance.

Joanne

# Exhibit 1E

## Lakita Spencer

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**From:** Bryant L. Francis  
**Sent:** Friday, October 13, 2017 4:59 PM  
**To:** Abdi Ali; Adriana Serrano; Alfonso Loera; Alfred Chaney; Alma Peña; Alonzo Blackmon; Alonzo Lobaton; Anamaria Baca; Andre Jones; Andrea Gomez; Andrea McCorvey; Andrew Jurkowski; Andrew Pabst; Anita Brooks; Anita Tong; Annie Adsuara; Antoine Stocker; Arnold Saavedra; Arthur Roane; Audie Lim; Audrey Forte-Green; Audrey Tarvins; Bahram Abedi; Balbir Chumber; Barbara Sheppard; Bernard Smith; Beverly Clark; Brandon Mark; Brandon Reeves; Brian Dunbar; Brian Kidd; Bryant L. Francis; Carletta Starks; Carmen Flores; Cassandra White; Catherine Vicentina; Cedric Chand; Chad Gagnon; Charles Hrepcshak; Charles Mathis; Chris Haas; Claudia Serret; Courtney Elder; Craig Simon; Crystal Heavers; Curtis Wilkins; Damon Carr; Daniel Moreno; Danny Ford; Danny Osalbo; Darrell Halsell; Darron Evans; Darryl Edwards; David Archuleta; David Arias; David Friend; DeJon Iglehart; Denise Sullivan; Derren Walker; Derrick Mapp; Diane Maldonado; Dion Bailey; Dominic Stuth; Donald Carreira; Donald Gonzaga; Doreen Stockdale; Doug Johnson; Douglas Herman; Douglas Mansel; Dwight Kennedy; Eddie Villaseñor; Eddie Washington; Edgar Lemi; Edie Brown; Edward Coates; Edward Norfleet; Edward Pickett; Elsie Miguel; Erick Gonzalez; Erol Torres; Erwin Carpenter; Eva Lillie; Eva Yee; Federico Reyna; Feng Kuan; Fidellia Hernandez; flucero; Francisco Arciniega; Francisco Flores; Frank Valdez; Frederick Jackson; Gary Duenas; Gary Germany; Gerrald McMurray; Gino Valente; Guillermo Lara; Gurcharan Duggal; gvaioleti; Harwell Lang; Hitesh Mehta; Hugh Johnson; Irvn Whitehead; Jacob Graef; James Clark; James Delagrange; Jan Glover; Jason Brown; Jason Smith; Jay Busby; Jayzelle Norflin; Jeffrey Strong; Jennie Dang; Jesse Richardson; Jim Donahue; Joan Zatopek; Joanne Holloway; Joe Nguyen; Joell Thompson; John Albrecht; John Nash; John Regan; Jon Michels; Jose Alonga; Joseph Friedman; Joseph Orcutt; Joseph Phillips; Joshua Polston; Juan Castaneda; Juan Reynoso; Kamar Niblet; Keith Saunders; Kenyatta Smith; Keonnis Taylor; Kevin Johnson; Kevin Pittman; Kimberly Moses; Kristi McKenney; Kyle Mobley; Lakita Spencer; Larry Hope; Larry Rout; Larry Vitatoe; Leroy Franklin; Leroy Laing; Leslie Gulyard Johnson; Li Ying Li; Linda Crockett; Louie Nerona; Luis Hernandez; Lynne Madera; Marco Moniz; Maria Alvarez; Marilyn Daniels; Mario Lloyd; Mark Bryant; Mark Stephens; Mark Ventura; Mary LeBlanc; Matt Davis (OAK); Matt Willingham; Matthew Murchison; Maurice Griffin; Mauro Bucio; Melissa Chiu; Michael Henning; Michael Miller; Michael Rogers; Michael Visconti; Mimi Gee; Misi Pulu; Myron Sims; Nate Estep; Nicole Vaughn; Niles Jackson; Obduila Ramos; Oscar Nevarez; Patricia Arcos; Patrick Guo; Paul Caruso; Paul Markey; Phyllis Randolph; Rajive Narayan; Ram Narayan; Ramon Merle; Rene Reina; Richard E. Mizer; Rick Martir-Cortes; Robert Shiner; Robert Smeester; Roberto Guerrero; Robyn Pierson; Rolanda Rogers; Rosa Isela Rico; Samantha Barnes; Sarah Corso; Scott Sauro; Sean Bolden; Sergio Duran; Shirley Young; Shon Jones; Stefan Janowski; Stephen Gordon; Sue Man; Susan Fizzell; Sylvester Enriquez; Taro Kaneko; Tashawna Thomas; Ted Getchell; Terrance Calloway; Terrence Taylor; Terry Padilla; Thai Phan; Tiana Taylor; Tienhy Truong; Tim Mogle; Timothy Wong; Tina Joe; Travis Henry; Troy Collins; Valerie Zabb-Parmley; Vanessa Valderrama; Veronica Whitfield; Vincent Lopez; Virginia Ramos; Walter Escobar; Wanena Monahan; Wendy Wu; William Kuna; Wogenia Kassa; Xavier Gonzales; Xiu Juan Wu; Yan Yi Chen; Yvette Nixon  
**Subject:** Aviation Division Realignment, Part 2

Good Afternoon Team OAK,

It's been about a week since the last Aviation Division email I sent your way, and I'm writing to you today with another update of a similar nature.

As I mentioned in the previous email, these last 18-months have allowed me to gain a perspective on our operation in order to make determinations that are in the best interest of the organization. I feel we are in good shape, and want to continue moving us in a positive direction by capitalizing on opportunities available to us. To that end, we've been working with HR on strategically filling positions to meet critical needs. As you all know, we are growing rapidly in terms of flights and, correspondingly, passengers. That has put even more of an emphasis on the terminal facility and all things Customer Experience.

In order to provide focused oversight on terminal related functions, I have made the determination to proceed with posting a position (Airport Operations Manager, Landside) which will be charged with this area of responsibility. Our goal is to fill it early in the New Year and have the successful candidate in place well in advance of what is anticipated to be an extremely busy Summer Season.

One of the most critical areas of the terminal's operation is Custodial Services. This team is the front line as it relates to maintaining the cleanliness and appearance of the terminal, both pre-and-post security screening. From bathroom cleanliness to holdroom appearance, floor cleaning, and other regular duties, Custodial Services plays a direct role in how our customers view Oakland International Airport. The natural alignment of this team is to be within the reporting structure of the Airport Operations Manager, Landside. Therefore, once filled, that shift will be implemented.

Craig Simon, Aviation Facilities Maintenance Manager, has done an absolutely phenomenal job of overseeing what constitutes more than half of the Aviation Division Staff, including Custodial Services. I commend Craig for his service and never ending "can do" attitude and approach. It has definitely not gone unnoticed. This realignment is proceeding with Craig's full knowledge and support. It will happen at a time when there will be ever increasing needs relating to our facilities Airport-wide and this will allow Craig to fully focus on that aspect of our operation and supporting the teams who are tasked with those important functions.

This is yet another step we are taking in the name of enhancing our focus on Customer Experience. Thank you for your ongoing support and collective contributions to our rising success. I truly appreciate what each and every one of you do, and how well you work together to make things happen.

Have a great evening and weekend!

Best Regards,

Bryant

Bryant L. Francis, C.M.

Director of Aviation

Port of Oakland | Oakland International Airport

T: (510) 563-6421 | F: (510) 568-8418

[bfrancis@portoakland.com](mailto:bfrancis@portoakland.com) | [www.oaklandairport.com](http://www.oaklandairport.com)



## Lakita Spencer

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**From:** Bryant L. Francis  
**Sent:** Thursday, October 05, 2017 5:09 PM  
**To:** Abdi Ali; Adriana Serrano; Alfonso Loera; Alfred Chaney; Alma Peña; Alonzo Blackmon; Alonzo Lobaton; Anamaria Baca; Andre Jones; Andrea Gomez; Andrea McCorvey; Andrew Jurkowski; Andrew Pabst; Anita Brooks; Anita Tong; Annie Adsuara; Antoine Stocker; Arnold Saavedra; Arthur Roane; Audie Lim; Audrey Forte-Green; Audrey Tarvins; Bahram Abedi; Balbir Chumber; Barbara Sheppard; Bernard Smith; Beverly Clark; Brandon Mark; Brandon Reeves; Brian Dunbar; Brian Kidd; Bryant L. Francis; Carletta Starks; Carmen Flores; Cassandra White; Catherine Vicentina; Cedric Chand; Chad Gagnon; Charles Hrepcshak; Charles Mathis; Chris Haas; Claudia Serret; Courtney Elder; Craig Simon; Crystal Heavers; Curtis Wilkins; Damon Carr; Daniel Moreno; Danny Ford; Danny Osalbo; Darrell Halsell; Darron Evans; Darryl Edwards; David Archuleta; David Arias; David Friend; DeJon Iglehart; Denise Sullivan; Derren Walker; Derrick Mapp; Diane Maldonado; Dion Bailey; Dominic Stuth; Donald Carreira; Donald Gonzaga; Doreen Stockdale; Doug Johnson; Douglas Herman; Douglas Mansel; Dwight Kennedy; Eddie Villasenor; Eddie Washington; Edgar Lemi; Edie Brown; Edward Coates; Edward Norfleet; Edward Pickett; Elsie Miguel; Erick Gonzalez; Erol Torres; Erwin Carpenter; Eva Lillie; Eva Yee; Federico Reyna; Feng Kuan; Fidellia Hernandez; flucero; Francisco Arciniega; Francisco Flores; Frank Valdez; Frederick Jackson; Gary Duenas; Gary Germany; Gerrald McMurray; Gino Valente; Guillermo Lara; Gurcharan Duggal; gvaioleti; Harwell Lang; Hitesh Mehta; Hugh Johnson; Irven Whitehead; Jacob Graef; James Clark; James Delagrange; Jan Glover; Jason Brown; Jason Smith; Jay Busby; Jayzelle Norflin; Jeffrey Strong; Jennie Dang; Jesse Richardson; Jim Donahue; Joan Zatopek; Joanne Holloway; Joe Nguyen; Joell Thompson; John Albrecht; John Nash; John Regan; Jon Michels; Jose Alonga; Joseph Friedman; Joseph Orcutt; Joseph Phillips; Joshua Polston; Juan Castaneda; Juan Reynoso; Kamar Niblet; Keith Saunders; Kenyatta Smith; Keonnis Taylor; Kevin Johnson; Kevin Pittman; Kimberly Moses; Kristi McKenney; Kyle Mobley; Lakita Spencer; Larry Hope; Larry Rout; Larry Vitatoe; Leroy Franklin; Leroy Laing; Leslie Gulyard Johnson; Li Ying Li; Linda Crockett; Louie Nerona; Luis Hernandez; Lynne Madera; Marco Moniz; Maria Alvarez; Marilyn Daniels; Mario Lloyd; Mark Bryant; Mark Stephens; Mark Ventura; Mary LeBlanc; Matt Davis (OAK); Matt Willingham; Matthew Murchison; Maurice Griffin; Mauro Bucio; Melissa Chiu; Michael Henning; Michael Miller; Michael Rogers; Michael Visconti; Mimi Gee; Misi Pulu; Myron Sims; Nate Estep; Nicole Vaughn; Niles Jackson; Obduila Ramos; Oscar Nevarez; Patricia Arcos; Patrick Guo; Paul Caruso; Paul Markey; Phyllis Randolph; Rajive Narayan; Ram Narayan; Ramon Merle; Rene Reina; Richard E. Mizer; Rick Martir-Cortes; Robert Shiner; Robert Smeester; Roberto Guerrero; Robyn Pierson; Rolanda Rogers; Rosa Isela Rico; Samantha Barnes; Sarah Corso; Scott Sauro; Sean Bolden; Sergio Duran; Shirley Young; Shon Jones; Stefan Janowski; Stephen Gordon; Sue Man; Susan Fizzell; Sylvester Enriquez; Taro Kaneko; Tashawna Thomas; Ted Getchell; Terrance Calloway; Terrence Taylor; Terry Padilla; Thai Phan; Tiana Taylor; Tienhy Truong; Tim Mogle; Timothy Wong; Tina Joe; Travis Henry; Troy Collins; Valerie Zabb-Parmley; Vanessa Valderrama; Veronica Whitfield; Vincent Lopez; Virginia Ramos; Walter Escobar; Wanena Monahan; Wendy Wu; William Kuna; Wogenia Kassa; Xavier Gonzales; Xiu Juan Wu; Yan Yi Chen; Yvette Nixon  
**Cc:** Chris Lytle  
**Subject:** Aviation Division Organizational Structure

Good Afternoon Team OAK,

For those who relocated from Water St / L107 / Shepard-Glenn, I hope the move to M102 has gone relatively smoothly. It appears to be going well so far, based upon comments I've received from many of you. I'm looking forward to what lies ahead, as we have an opportunity to collaborate in a way which, until now, has not been possible. It is a big change, and one which will take time to fully adjust to, but I feel it will be incredibly rewarding for the entire organization in the years to come.

It has been just over 18-months since I joined the Port of Oakland as Director of Aviation. In that time, I have immersed myself in the process of learning about how we function, both at the Port level and within the Aviation Division. I continue to advance along that path, as our organization is a large and complex one. Among other things, I have learned that the amount of support we receive from Engineering, Legal, Finance, HR, and other Port Departments is critical to our ability to be successful and to function at a high level.

Throughout my 21-years in the Aviation Industry, I have been a part of multiple organizational structures. I've now worked at airports in each FAA classification: General Aviation, Non-Hub, Small Hub, Medium Hub, and Large Hub. Each has been unique in its approach to business. I greatly value that experience as it has influenced key decisions made surrounding organizational structure and other areas.

Based on my observations, industry experience, discussions with staff, and identifying opportunities for optimization and efficiency, I feel it is the right time to implement a shift in our organizational structure as we begin to settle into our new home base.

Following close collaboration with Kristi McKenney, Steve Gordon, and Matt Davis, I am announcing changes which involve the Business Office and Operations Departments. Currently, the Ground Transportation (GT) function is housed under Operations. Going forward, it will be repositioned under the Business Office. I feel this is a more natural home as the Business Office currently oversees the Parking and Shuttle Bus operations, both of which are Landside in nature. Ground Transportation is also a Landside based function. I expect this alignment will create certain synergies and introduce opportunity for the newly expanded team to function more efficiently and effectively. There are several functions currently executed by GT staff which they will be relieved of going forward, such as Lost & Found, Rodent Control, and Interior Signage.

Further, certain of the Aviation Finance related functions currently housed in the Business Office will revert to Port Finance. Without this shift, it would be incredibly difficult for the Business Office to successfully undertake oversight of Ground Transportation. Information related to our Budget Planning process will be shared with Department Managers in the coming weeks. I will work with Sara Lee, Port CFO, to determine appropriate points of contact within her staff. In recent years, Port Finance has taken a higher level of interest in the Aviation Division, which allows us a timely opportunity to focus on other areas of our growing operation. Also, as part of this upcoming organizational shift, the Business Office will soon begin to provide greatly needed support to Facilities Maintenance.

I commend both Matt and Steve for their exemplary contributions to the Aviation Division in their capacity as Department Managers. Each of them has stepped up and taken on new and different tasks as needed, and I am grateful for their spirit of and commitment to teamwork. I also thank Dion Bailey for his interest in and willingness to temporarily lead the Ground Transportation team in recent months.

This transition will take time, and I ask that you bear with us during implementation. I expect it will begin in earnest in early November. More information will be forthcoming. Thank you for your ongoing support as we strive to reach our greatest ever level of success and, with it, record passenger activity. We are on a trajectory which will lead us back to Large Hub status in short order. I, for one, am excited by that prospect. I hope you are as well.

Best Regards,

Bryant

Bryant L. Francis, C.M.  
Director of Aviation  
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