



SFMTA

Human Resources Division Quarterly Update

Kimberly Ackerman, Chief People Officer

SFMTA Board of Directors

August 3, 2021

Human Resources Division

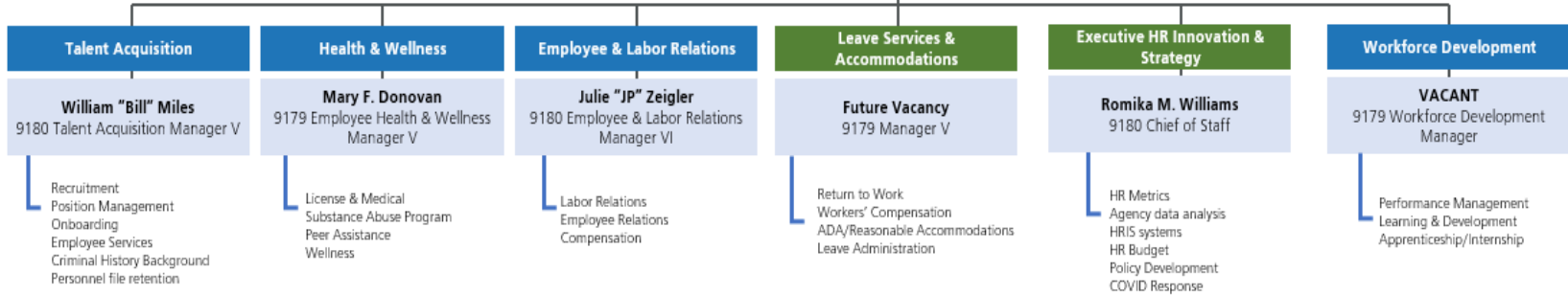
HR Quarterly Update

HR Organization Structure & Staffing – HR 2.0

- Legacy of Human Resources **Staffing Challenges**
- 20 FTEs for additional **HR support**
- Better aligned organizational structure, streamline processes, enhance collaboration and improve the employee experience
 - **Leveraging technology** to for HR efficiency and process improvements
 - **Meeting service restoration, changing business and hiring needs**
 - Accomplishing the **Racial Equity Action Plan, Deloris Blanding** objectives and the **Gould Report** recommendations



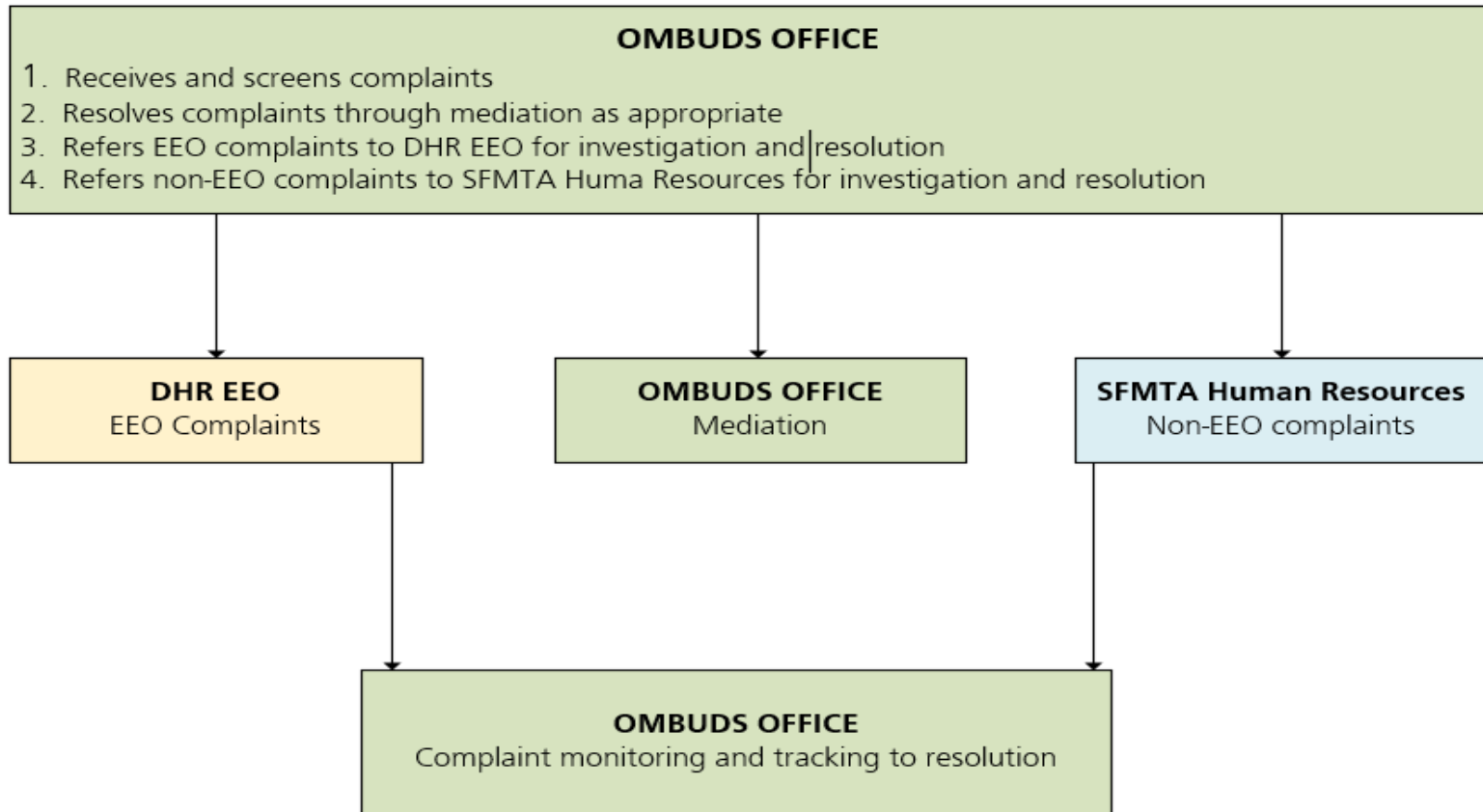
Human Resources
Kimberly Ackerman
 9183
 Chief People Officer



 Denotes a new or modified business unit

Ombudsman Office

Centralized Complaint Handling Workflow



SFMTA HR Commitment



The HR team is committed to:

- Thoroughly understanding workforce issues related to discipline, hiring, training, the employee experience.
- Implementing process improvement strategies to mitigate racial disparities and advance equity.
- Accomplishing and implementing the racial equity objectives in the workforce, in 7 focused areas.
- To working across SFMTA divisions to establish sustainable structures for monitoring and evaluating workforce disparities and racial equity commitments.

RE AP Dashboard

Launching as an internal webpage. Will be duplicated on public OREI webpage

SFMTA **Racial Equity Action Plan Tracking Dashboard**
Phase I – Internal Programs & Policies

Welcome to the SFMTA Racial Equity Action Plan (RE AP) Phase I tracking dashboard!

This dashboard contains the latest information on our RE AP commitments, with quarterly status updates for each action. This dashboard represents one layer of accountability for the RE AP, and is a tool for ongoing monitoring of the agency's progress on advancing racial equity.

To explore the dashboard, select one of the seven Focus Area tiles on the right. You can use the filters at the top of each page to find specific actions. Please contact Performance@SFMTA.com if you have feedback on dashboard design, and Chiamaka Ogwuegbu (Chiamaka.Ogwuegbu@SFMTA.com) if you have feedback or reflections on the RE AP.

Focus Area 1: Hiring and Recruitment
Focus Area 2: Retention and Promotions
Focus Area 3: Discipline and Separation
Focus Area 4: Diverse and Equitable Leadership
Focus Area 5: Mobility and Professional Development
Focus Area 6: Organizational Culture of Inclusion and Belonging
Focus Area 7: Boards and Commissions

Overview
Hiring and Recruitment
Retention and Promotions
Discipline and Separation
Diverse and Equitable Leadership
Mobility and Professional Development
Culture of Inclusion and Belonging
Boards and Commissions

Racial Equity Action Plan Accomplishment

Employee Performance & Tracking

- Automated process for tracking, monitoring, and review of employee discipline.
- Controls in place to ensure management and HR reviews for consistent application of discipline.
- This will ensure that ALL relevant data is being reported and entered into our HRIS.
- Enable HR to analyze our discipline data and provide interventions.
- Target go live date, Phase 1 – Transit Operations, September 2021.
- Provide Manager training regarding use of tracking form - how to complete the required information and include bias training in the corrective action process.

Racial Equity Action Plan Accomplishment

Performance Management Process (PPAR)

- Eliminated ratings to promote constructive feedback opportunities and conversations.
- FY21/22 collaborating with OREI to incorporate mandatory equity trainings as part of the Performance management process.
- Key Employee Performance Objectives include:
Equity and Inclusiveness, Respect, Inclusivity & Integrity

FY 2020-2021 Performance Management Training

How to Conduct a Performance Evaluation

Giving & Receiving Feedback

Developing Performance Goals

Mitigating Bias

Racial Equity Action Plan Accomplishments



Update minimum qualifications

- Minimum Qualifications for MTA management positions (1st phase).
- Changes include allowing for any degree to qualify unless legally required to be specific, allowing for a full substitution for a degree requirement with related experience, and ensuring that the substitution does not require a high bar of supervisory or management experience.
- These changes will result in a greater applicant pool diversity and greater promotive opportunities.

Require interview questions on advancing equity

- Mandatory question for all interviews.
- List of example questions has been initiated and is being updated as new questions are used. Interview packets are being reviewed to ensure the existence of an equity related questions or equity related rating criteria.
- We will be able to assess a candidate's commitment to equity.

Gould Report Summary



- Gould Independent Reviewer's Report (July 9, 2021)
- A total of Nineteen (19) findings
- MTA had nine (9) findings
- Implementation of objectives to mitigate and address the summary findings include:
 - Use of Peer Mediation to resolve complaints
 - Develop an Acting Policy
 - Enhance Outreach to under-represented job classes
 - Ombudsperson Office to holistically address complaint resolution and implementation of EEO corrective actions.
 - Provide job opportunities through pre-apprenticeship, apprenticeship and job training programs for under-represented, under-employed and unemployed San Francisco residents.
 - Evaluate the process of selection of interview panelists by hiring managers.
 - Address disciplinary actions and probationary and medical releases.
 - Support and invest in agency positions to address racial equity and diversity, equity, and inclusion.

Human Resources Division

Next Steps

- HR 2.0 staffing to support new hires in FY21-22
- Partner with the Ombuds Office to develop the complaint resolution process and to build support of the Peer Mediation Program
- Go Live in September with Performance Tracking and move to Phase II
- Continue to collaborate on equity projects with OREI
- Annual HR Data Analytics and Reporting

THANK YOU!

Kimberly Ackerman, Chief People Officer

Kimberly.Ackerman@SFMTA.com



SFMTA

Office of Race, Equity, and Inclusion Quarterly Update

Josephine Ayankoya, Race, Equity and Inclusion Officer

SFMTA Board of Directors

August 3, 2021

Office of Race, Equity, & Inclusion (OREI) Quarterly Update

1. Establishing OREI Structure

- Foundations of Understanding
- The Function of OREI in the Agency
- Organizational Structure & Staffing

2. Overlapping OREI Functional Areas

- Phase One Racial Equity Action Plan (RE AP)
- Relevant Assessments (Blanding & Gould Report)
- OREI Listening Sessions

3. Equity Analysis & Stakeholder Engagement

- To Frame OREI Structure, Function, Priorities, & Programs
- To Increase Internal & External Connections for Collaboration

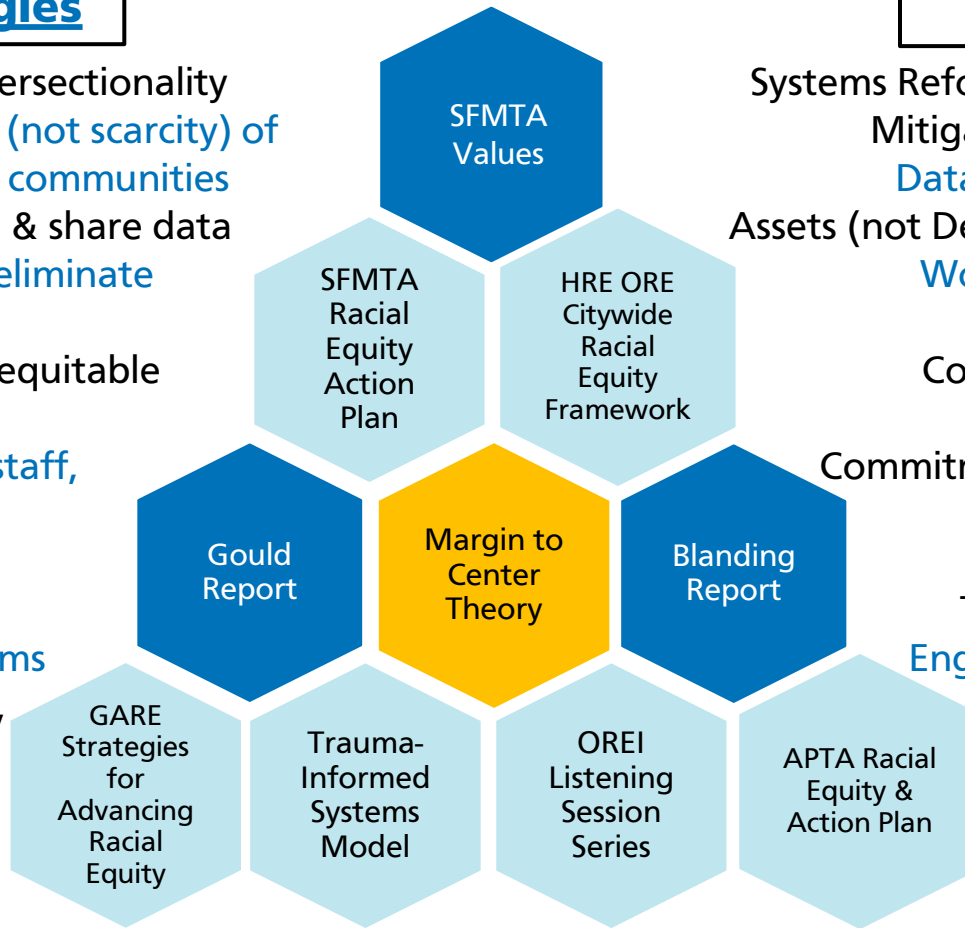
4. Accomplishments & Challenges

5. Next Steps

OREI Foundations of Understanding

Baseline Strategies

Lead with race, center intersectionality
 Acknowledge abundance (not scarcity) of skills in underrepresented communities
 Collect, monitor, evaluate & share data
 Review & revise policy to eliminate workforce disparities
 Process improvement for equitable outcomes
 Racial equity training for staff, supervisors & leadership
 Reform EEO & labor complaint processes
 Restorative justice programs
 Leadership accountability, support & development
 360 Performance Reviews



Core Values

Systems Reform for Just Outcomes & Mitigation of Racial Inequities
 Data-driven decision-making
 Assets (not Deficit) Based Approaches
 Workforce Development & Capacity-Building
 Consistent Communication
 Data Sharing
 Commitment to Equity in System Operations & Practices
 Urgency & Intentionality
 Transparency & Integrity
 Engagement, Collaboration & Partnership
 Trauma Reduction
 Safety

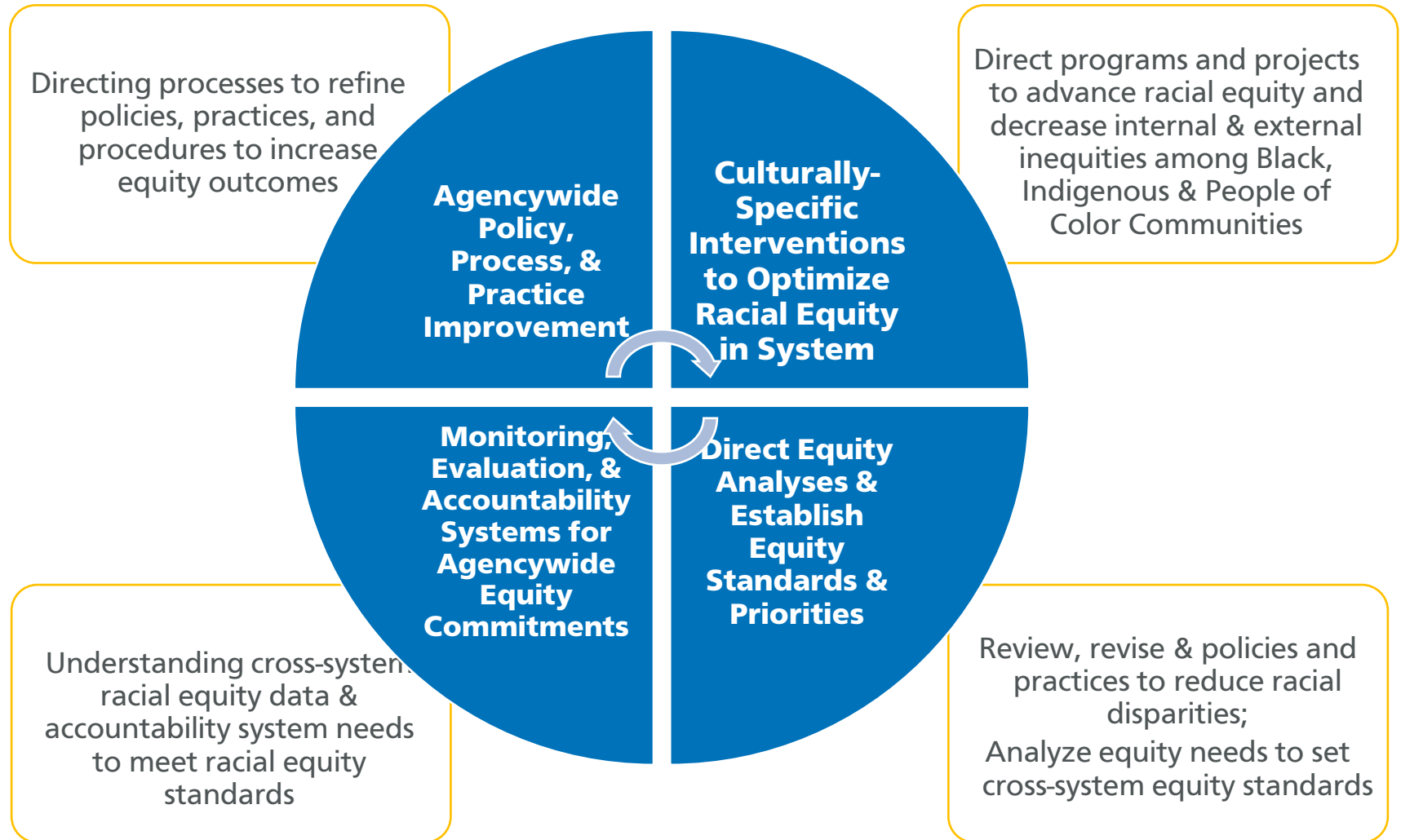
OREI Foundations of Understanding

Source	Framework	Baseline Strategies & Core Values
Human Rights Commission, Office of Racial Equity	<u>Citywide Racial Equity Framework</u>	<ul style="list-style-type: none"> Lead with race, center intersectionality Strengthen racial & ethnic diversity at all levels of work Review/revise policies and practices with racial equity lens to reduce racial disparities in hiring, discipline, pay, & lead appointments Disaggregate & transparently share workforce data by race & gender Challenge race-neutral policies & outcomes
SFMTA Workforce	<u>Racial Equity Action Plan (Phase One)</u>	<ul style="list-style-type: none"> Equitable recruitment and hiring across all levels of work In-reach retention & promotion plans Review, disaggregate, & share pay, discipline, hiring, & workforce data Eliminate disciplinary disparities & implement restorative, accountability systems Leadership accountability, training, & commitment to advancing racial equity for employees Improve racial equity and frontline staff focused career development, belonging, and inclusion practices
Dolores Blanding, Independent Ombudsperson	<u>Blanding Report</u>	<ul style="list-style-type: none"> Manager & all-staff training and accountability systems to foster safe environment Implement complaint case management system to review & track discipline cases Review & be more transparent about exempt positions Increase Employee Labor Relations staffing
William B. Gould IV Independent Reviewer	<u>Gould Report</u>	<ul style="list-style-type: none"> Reform its hiring & promotion procedures to reduce hiring manager discretion; Ensure the independence of interview panels Refine apprenticeship programs and other upskilling programs The City should overhaul its EEO investigation processes Appeal systems with independent and diverse hearing officers Remove MOU provision requiring employees to choose between filing an EEO complaint with DHR or filing a grievance based on the non-discrimination clauses of their respective collective bargaining agreements



Source	Framework	Baseline Strategies & Core Values
Bell Hooks, <i>Feminist Theory: From Margin to Center</i>	<u>Margin to Center Theory</u>	When developing & implementing equity solutions, center those who are most likely to be on the margins of power & privilege
Trauma Transformed	<u>Trauma Informed Systems Model & Principles & Leadership Competencies</u>	Evaluate, understand, & reduce trauma in policies, process, & services <u>Reflective, collaborative, prevention-oriented culture of learning</u> Shared foundational understanding of healing & trauma <u>Communication</u> <u>Inclusive Leadership</u> <u>Relational Leadership</u> <u>Safety</u> <u>Stability</u> <u>Cultural Humility</u> <u>Equity</u>
SFMTA Office of Race, Equity & Inclusion	Recommendations from Listening Session Series	Agencywide equity analysis, input on implementation & resource needs for Racial Equity Action Plan & development of OREI <u>Equity Training</u> <u>Pipeline Program Benchmarks</u> <u>Workforce Development</u> <u>Staff Belonging & Support</u> <u>Refinement of Hiring, Interview, Discipline, and Accountability Policies & Practices</u> <u>Newsletter, Communication, & Engagement Strategies</u>
Government Alliance for Racial Equity	<u>Six Strategies for Advancing Racial Equity</u>	Use racial equity framework Build organizational capacity Implement racial equity tools Be data-driven Partner with other institutions and communities Operate with urgency and accountability
American Public Transportation Association	<u>APTA Racial Equity & Action Plan</u>	Measure & recognize progress on racial equity Offer necessary racial justice & equity training Create mentorship, sponsorship & engagement programs Advocate for equity, promoting diversity in executive staff & contractors providing services Impact-oriented partnerships
SFMTA Values	Internal Values & External Values	<u>Equity</u> <u>Respect</u> <u>Inclusivity</u> <u>Integrity</u> <u>Accessibility</u> <u>Safety</u> <u>Economic Vitality</u> <u>Service Quality</u> <u>Environmental Stewardship</u> <u>Trust</u> <u>Accountability</u> <u>Transparency</u>

The Function of OREI in the Agency

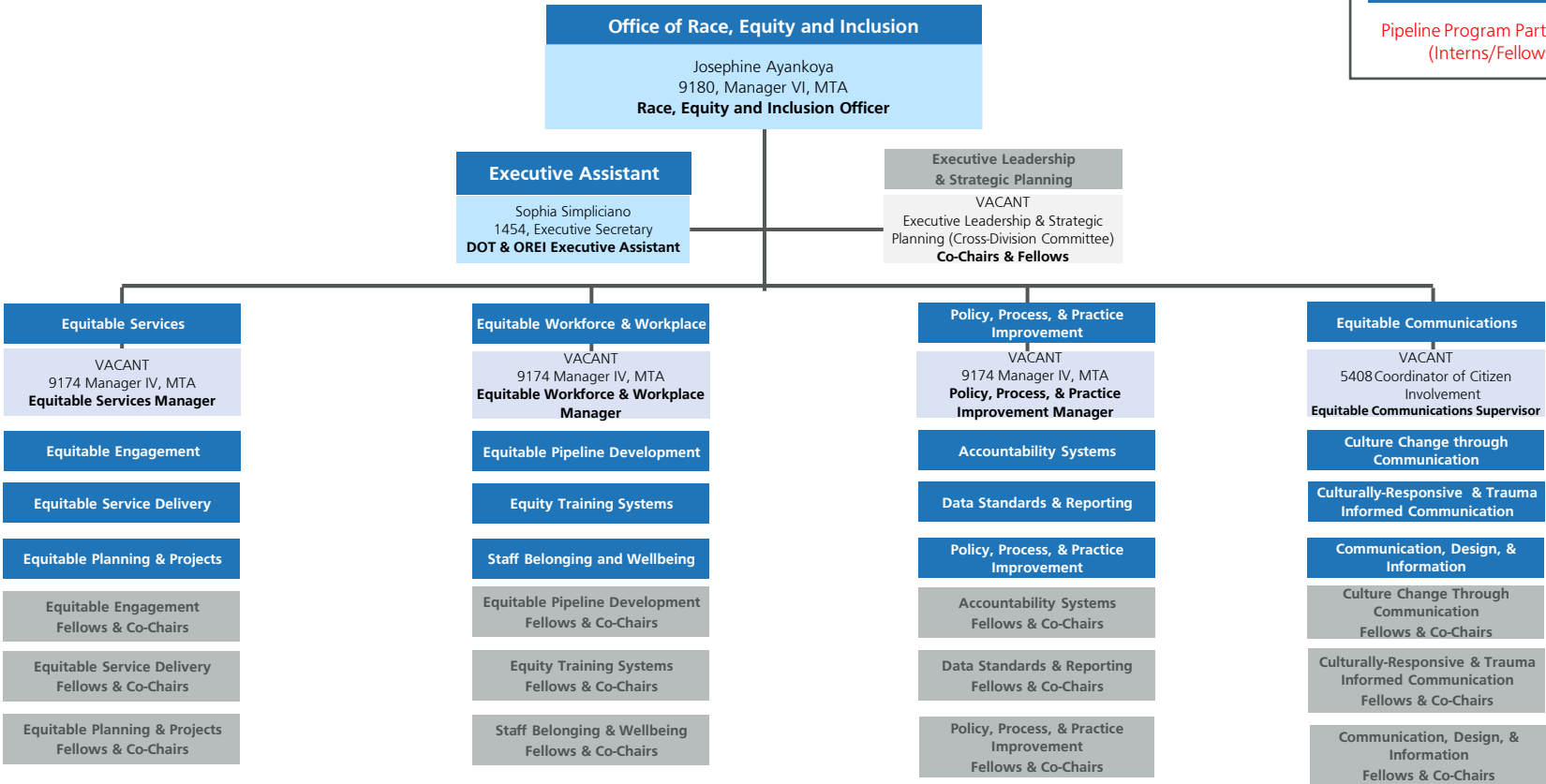




San Francisco Municipal Transportation Agency
Office of Race, Equity and Inclusion (OREI)
Organizational Chart

Legend

- OREI Cross-Division Fellows/Co-Chairs
- MTA Staff
- Pipeline Program Participants (Interns/Fellows)



Equity Analyses & Standards | Culturally-Specific Interventions | Monitoring, Evaluation, & Accountability | Policy, Process, & Practice Improvement



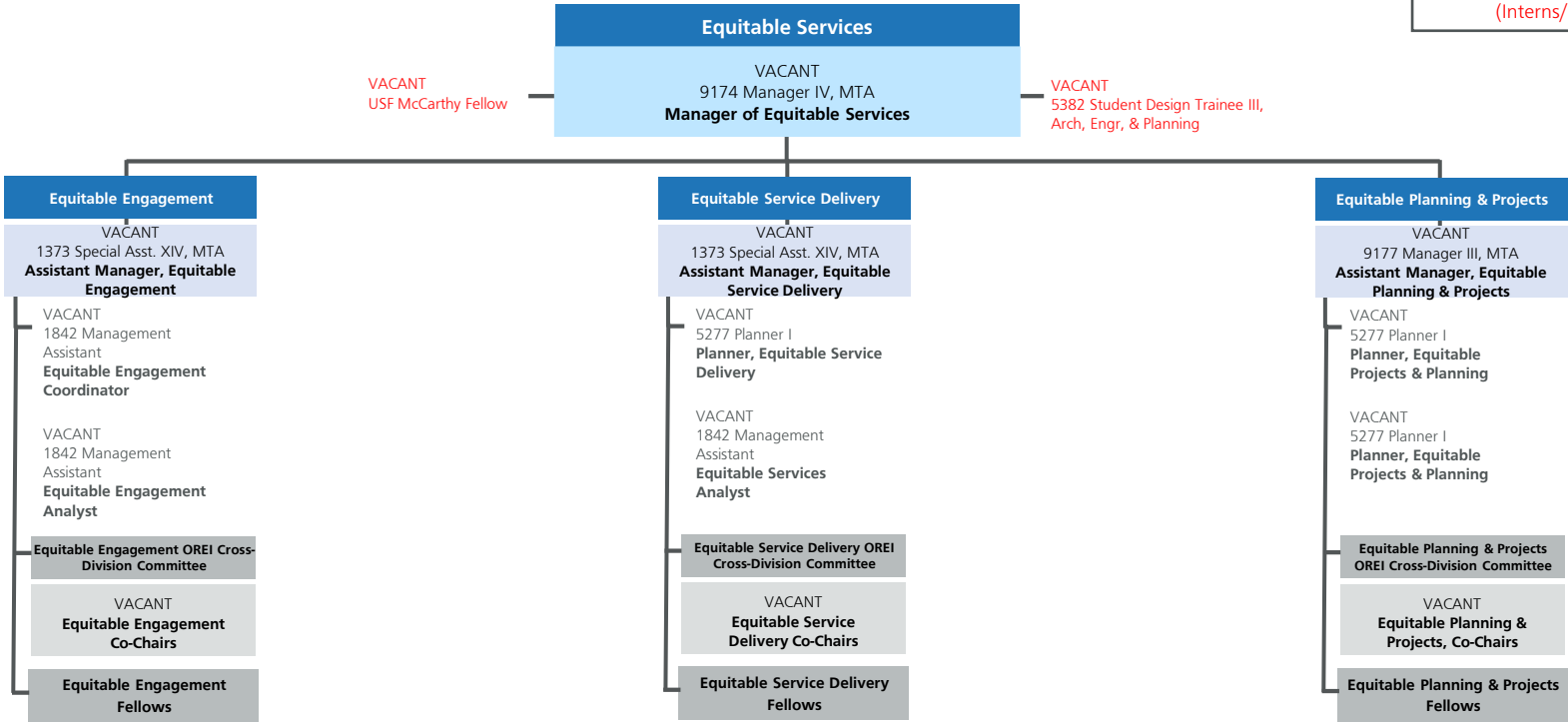
San Francisco Municipal Transportation Agency
Office of Race, Equity and Inclusion
 Equitable Services Section

Legend

OREI Cross-Division
 Fellows/Co-Chairs

MTA Staff

Pipeline Program Participants
 (Interns/Fellows)





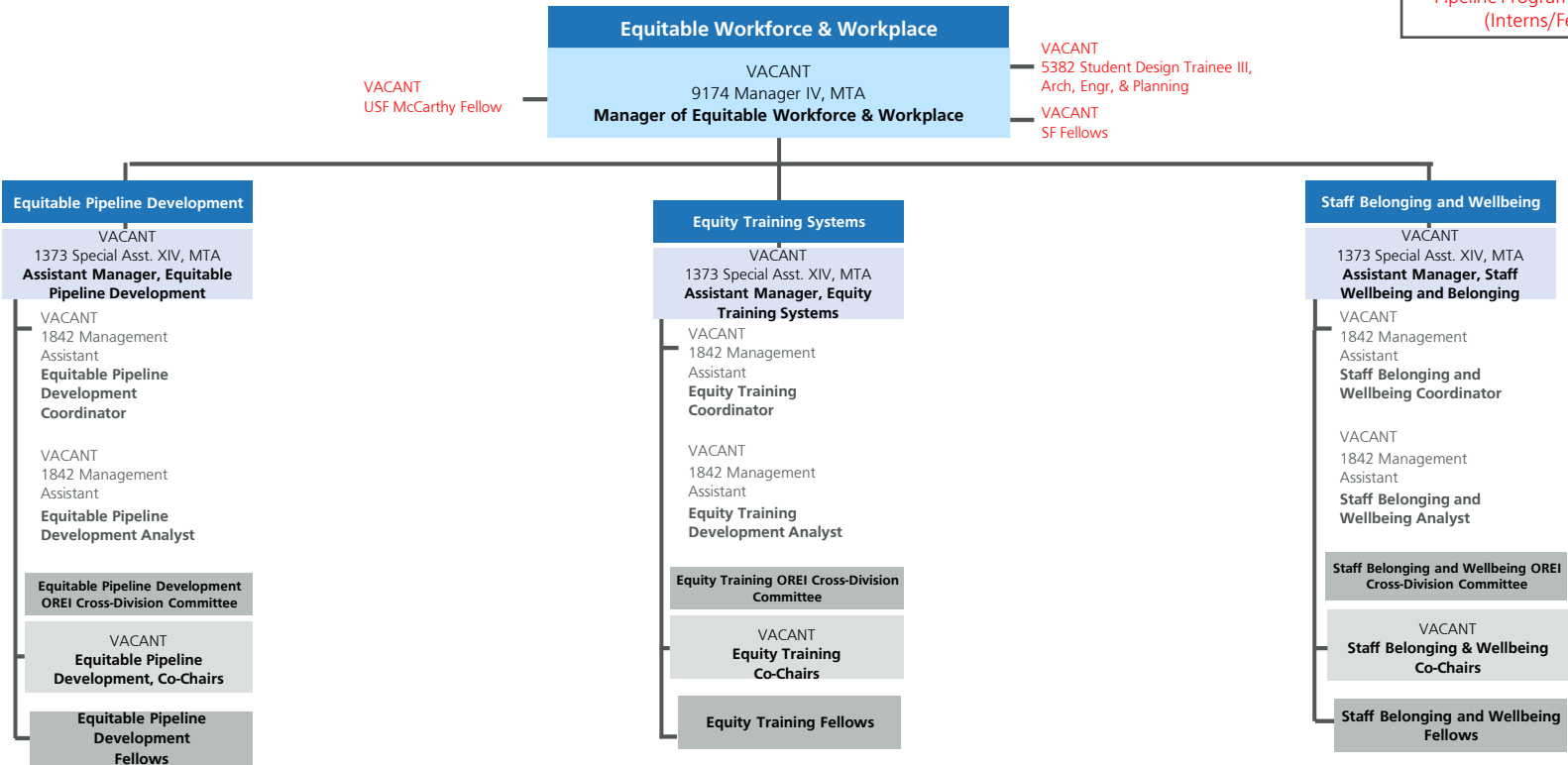
San Francisco Municipal Transportation Agency
Office of Race, Equity and Inclusion
Equitable Workforce & Workplace Section

Legend

OREI Cross-Division Fellows/Co-Chairs

MTA Staff

Pipeline Program Participants (Interns/Fellows)





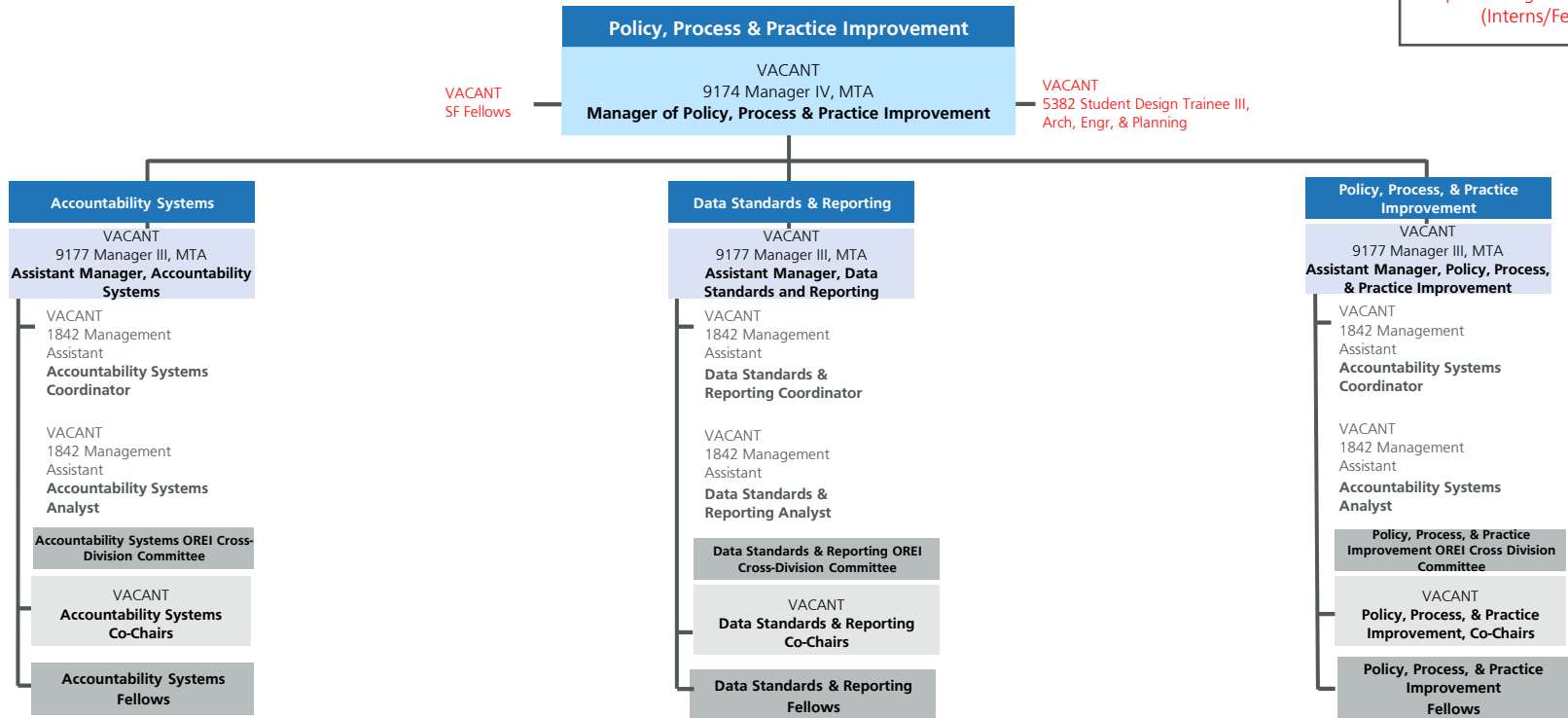
San Francisco Municipal Transportation Agency
Office of Race, Equity and Inclusion
Policy, Process & Practice Improvement Section

Legend

OREI Cross-Division
 Fellows/Co-Chairs

MTA Staff

Pipeline Program Participants
 (Interns/Fellows)

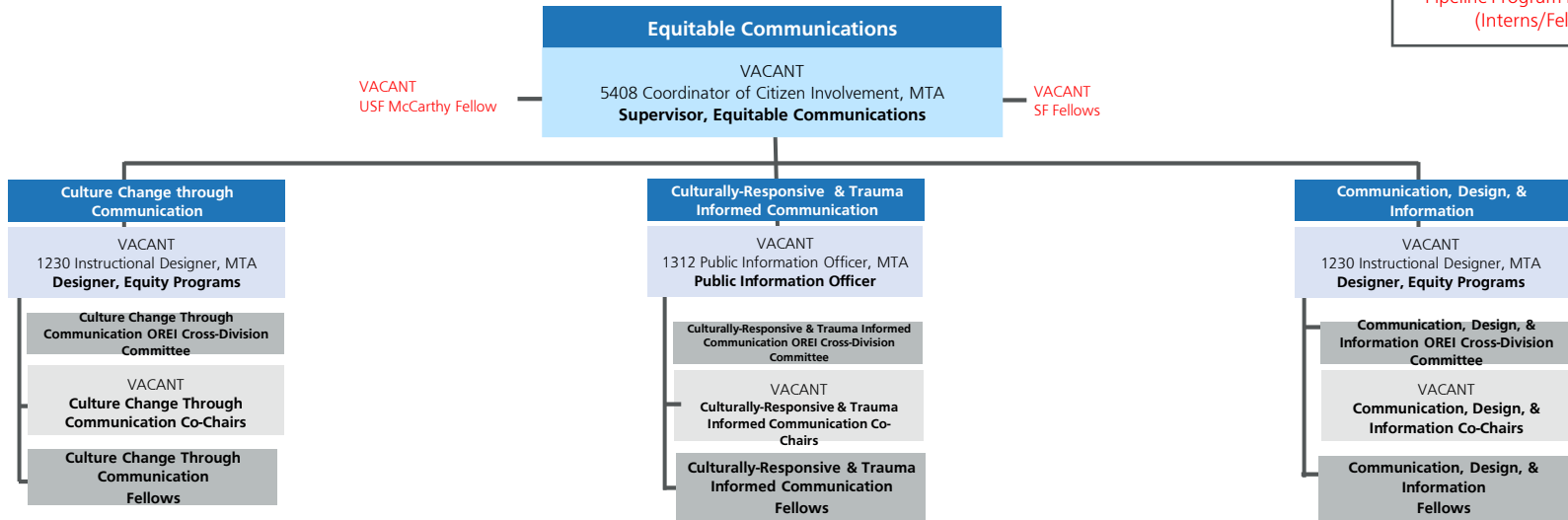




San Francisco Municipal Transportation Agency
Office of Race, Equity and Inclusion
 Equitable Communications Section

Legend

- OREI Cross-Division Fellows/Co-Chairs
- MTA Staff
- Pipeline Program Participants (Interns/Fellows)



Equity Analyses & Standards | Culturally-Specific Interventions | Monitoring, Evaluation, & Accountability | Policy, Process, & Practice Improvement

Overlapping OREI Functional Areas with Racial Equity Action Plan Commitments

Sections of the Office of Race, Equity, & Inclusion (OREI)

Core Functions of Office of Race, Equity, & Inclusion (OREI)

	Policy, Process, & Practice Improvement	Equitable Workforce & Workplace	Equitable Services	Equitable Communications
Equity Analyses & Standards	Outreach Hiring Equity Tools Monitoring, Evaluation & Decision-Making Interviews & Panels Pipeline Programs Discipline Performance Management	Data Transparency Outreach Hiring Interviews & Panels Pipeline Programs Training & Development Performance Management	Equity Tools Monitoring, Evaluation & Decision-Making Outreach	Outreach Hiring Equity Tools Monitoring, Evaluation & Decision-Making Interviews & Panels Pipeline Programs Performance Management
Culturally-Specific Interventions	Outreach Hiring Interviews & Panels Pipeline Programs Discipline Training & Development	Outreach Hiring Interviews & Panels Pipeline Programs Training & Development Wellness & Support	Outreach	Outreach Hiring Pipeline Programs Discipline Training & Development Wellness & Support
Monitoring, Evaluation, & Accountability	Outreach Hiring Equity Tools Monitoring, Evaluation & Decision-Making Data Transparency Discipline Performance Management	Outreach Hiring Equity Tools Monitoring, Evaluation & Decision-Making Interviews & Panels Data Transparency Discipline Performance Management	Equity Tools Monitoring, Evaluation & Decision-Making	Outreach Hiring Discipline Training & Development Performance Management
Policy, Process, & Practice Improvement	Equity Tools Monitoring, Evaluation & Decision-Making Pipeline Programs Data Transparency Discipline Performance Management	Outreach Hiring Interviews & Panels Pipeline Programs Data Transparency Discipline Training & Development Performance Management	Equity Tools Monitoring, Evaluation & Decision-Making	Outreach Hiring Interviews & Panels Pipeline Programs Data Transparency Discipline Wellness & Support Performance Management



Racial Equity Action Plan Status Update

Data Current as of: 7/24/2021

Action Status Summary

Not Started

In Progress

Ongoing

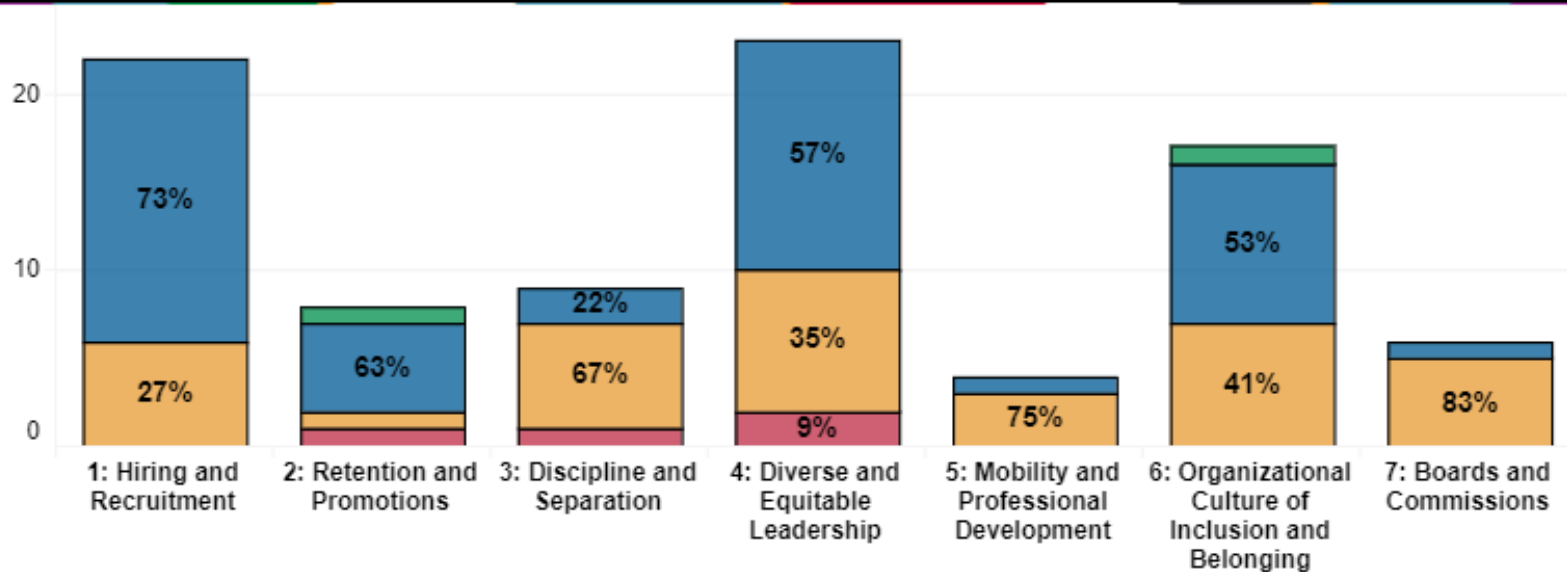
Complete

4.5%

40.4%

52.8%

2.2%



Complete (2.2%): Complete (may have ongoing follow-up)

Ongoing (52.8%): Phased implementation started & ongoing, planning, & implementation needed

In Progress (40.4%): Planning started but first phase of implementation has not started

Not Started (4.5%): No action taken to date to advance action

Overlapping OREI Functional Areas with Blanding & Gould Report Recommendations

Sections of the Office of Race, Equity, & Inclusion (OREI)

	Policy, Process, & Practice Improvement	Equitable Workforce & Workplace	Equitable Communications
Equity Analyses & Standards	Training & Development Accountability for Safe Environments HR Visibility Center 24/7 Staff Needs Hiring	Training & Development Accountability for Safe Environments Outreach Hiring	Accountability for Safe Environments HR Visibility Outreach Communicate HR Improvements Center 24/7 Staff Needs Hiring
Culturally-Specific Interventions	Outreach Hiring	Accountability for Safe Environments Outreach Center 24/7 Staff Needs	
Monitoring, Evaluation, & Accountability	Monitor & Evaluate Discipline, Separation & Workforce Data Training & Development Accountability for Safe Environments Center 24/7 Staff Needs Case Management System	Monitor & Evaluate Discipline, Separation & Workforce Data Training & Development Accountability for Safe Environments Center 24/7 Staff Needs Case Management System	Accountability for Safe Environments
Policy, Process, & Practice Improvement	Training & Development Accountability for Safe Environments Outreach Communicate HR Improvements Center 24/7 Staff Needs Reform EEO & Labor Processes	Case Management Model to Track Complaints HR Visibility Center 24/7 Staff Needs Reform EEO & Labor Processes	Training & Development HR Visibility Center 24/7 Staff Needs Reform EEO & Labor Processes

Core Functions of Office of Race, Equity, & Inclusion

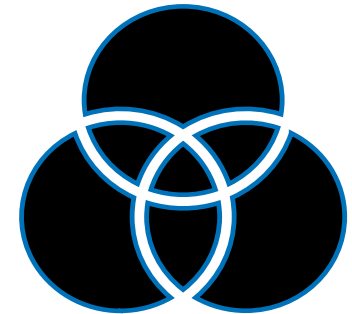
Equity Analysis & Stakeholder Engagement



Staff Engagement



Supervisor & Manager Engagement



Stakeholder Engagement

Framing OREI Structure, Function, Priorities, & Programs
Increasing Internal & External Connections for Collaboration

Accomplishments

Racial Equity Action Plan | Phase One

Corresponding Actions	Racial Equity Action Plan Accomplishments
1.1.2 1.3.5 2.2.3 2.3.1 2.3.2 3.3.1 3.3.2 3.3.3 6.2.3 7.1.1 7.1.2	Equity Data Transparency Project <ul style="list-style-type: none"> Workforce Discipline Promotion Pay Hiring & Interview Process
6.1.1 6.1.2 6.2.3 6.2.5 1.5.6 3.2.1 5.1.1 5.1.2	Mandatory Racial Equity Training
6.1.2 6.2.5 6.2.3 5.2.1	Integrating Equity into Performance Planning <ul style="list-style-type: none"> Executive Team Workshops to Examine Inequities & Develop Personalized Action Plans All-Staff Documentation of Mandatory Racial Equity Training in Performance Appraisal
6.1.2 6.2.5 6.2.3 5.2.1 2.2.2 2.3.1 2.3.2 1.2.2 3.2.1 3.3.3 6.1.1 7.2.2 1.1.1 1.1.3 1.1.4 2.2.3 5.1.1 5.2.2 6.1.1 6.2.1 6.2.4 1.2.1 1.2.3 1.3.1 7.3.1 1.5.1 6.4.4 5.2.2	Equity Analyses & Standards <ul style="list-style-type: none"> All-Staff & Executive Team Workshops to Examine Inequities & Develop Plans Cross-Agency Equity Analyses to Improve Outcomes & Identify Implementation Needs <ul style="list-style-type: none"> Equity Training Pipeline Program Benchmarks Workforce Development Staff Belonging & Support Refinement of Hiring, Interview, Discipline, and Accountability Policies & Practices Newsletter, Communication, & Engagement Strategies

Accomplishments & Challenges

Accomplishments	Challenges
<ul style="list-style-type: none">• OREI Listening Session Series<ul style="list-style-type: none">• Engaged over 1,300 (approx. 20% of workforce) in scoping implementation needs for RE AP commitment & OREI priorities• Increased capacity of operational needs to convene staff on 24/7 model for racial equity training• OREI responded to \$11 Million Pandemic Funding Call for Projects• Efficiency and Partnerships<ul style="list-style-type: none">• Agency, City, Regional, National• Cross-System Collaboration, Interest, & Support	<ul style="list-style-type: none">• Inadequate Resources<ul style="list-style-type: none">• Staffing• Budget Uncertainty• Urgency of Need & Magnitude of Racial Equity Challenges<ul style="list-style-type: none">• Scoping Work, Securing Resources, & Filling Urgent Needs• Communication, Follow-Up, & the Impact on Trust/Willingness• Staff Morale, Stress, Anxiety, & Dissatisfaction



SFMTA

Next Steps: OREI Hiring

Policy, Process, & Practice Improvement Manager (#9174 | Manager IV | PCS)

Minimum Qualifications

- Possession of a bachelor's degree ([Can substitute with additional work experience!](#))
- Five (5) years of work experience in either or both work areas:
 - Process development, program planning, program evaluation, change management, culture change, data management, policy analysis, or policy development
 - Working at a mass transit agency
- Two (2) years of supervisory experience ([In any sector, including those mentioned above. Can substitute 1 year with Master's Degree](#))



Salary \$133,770 – \$170,742



Salary \$133,770 – \$170,742

Equitable Workforce & Workplace Manager (#9174 | Manager IV | PCS)

Minimum Qualifications

- Possession of a bachelor's degree ([Can substitute with additional work experience!](#))
- Five (5) years of work experience in either or both work areas:
 - Cultural/community engagement, racial equity, transportation equity, inclusion, workforce/professional development, training, or outreach
 - Working at a mass transit agency
- Two (2) years of supervisory experience ([In any sector, including those mentioned above. Can substitute 1 year with Master's Degree](#))

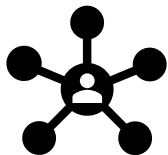
Equitable Services Manager (#9174 | Manager IV | PCS)

Minimum Qualifications

- Possession of a bachelor's degree ([Can substitute with additional work experience!](#))
- Five (5) years of work experience in either or both work areas:
 - Working at a mass transit agency
 - Cultural/community engagement, racial equity, transportation equity, urban, city, regional and/or other related planning environment (such as transportation planning, environmental planning, architecture, or urban design)
- Two (2) years of supervisory experience ([In any sector, including those mentioned above. Can substitute 1 year with Master's Degree](#))



Salary \$133,770 – \$170,742



Salary \$115,050 – \$139,802

Equitable Communications Supervisor (#5408 | Coordinator of Citizen Involvement | PCS)

- Possession of a bachelor's degree ([Can substitute with additional work experience!](#))
- Three (3) years of work experience directing or coordinating programs in any of these work areas:
 - Community or stakeholder, engagement, communication, outreach, graphic design, photography, video/film production, storytelling, or marketing

Next Steps

- September SFMTA All-Staff Racial Equity Update
- Equity Data Project
- Launch of OREI Cross-Divisional Committee: Equitable Workforce & Workplace
- Listening Session Reports & Executive Team Racial Equity Commitments
- Confirming OREI Fiscal Year 2021-2022 Project Plan & Budget
- Monthly OREI Updates with Affinity Groups & Workplace Committees

**THE
MARATHON
CONTINUES.**



*Thank
you*

Questions?

Josephine Ayankoya, Race, Equity and Inclusion Officer

Josephine.Ayankoya@sfmta.com