

THE CITY OF



PLEASANTON.®

Management/Confidential Employee

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Performance Compensation Plan

2018-15

**Management/Confidential Employee Performance Compensation Plan**  
**Table of Contents**

Section 1. Introduction.....	<u>23</u>
Section 2. Management and Confidential Classifications .....	<u>23</u>
Section 3. Salaries.....	<u>23</u>
Section 4. Special Compensation .....	<u>57</u>
Section 5. Health and Welfare.....	<u>79</u>
Section 6. Leaves .....	<u>1623</u>
Section 7. Retirement.....	<u>2433</u>
Section 8. Uniforms .....	<u>2635</u>
Section 9. Deferred Compensation .....	<u>2636</u>
Section 10. Tuition & Book Reimbursement.....	<u>2736</u>
Section 11. Education Incentive Pay.....	<u>2837</u>
Section 12. Automobiles and Automobile Allowances .....	<u>2838</u>
Section 13. Miscellaneous.....	<u>3039</u>
Appendix A—Management Control Points.....	<u>3141</u>
Appendix B—Confidential Control Points.....	<u>3445</u>
Appendix C—Management and Confidential Base Salary Plan Schedule .....	<u>3548</u>
Appendix D—Fire Department Management .....	<u>3649</u>
Appendix E—Police Department Management.....	<u>4053</u>
Appendix F—Program Guidelines for Issuance of Information Technology Equipment.....	<u>4255</u>
Appendix G—Administration of the Bonus Program .....	<u>4457</u>
Appendix H—History of Management/Confidential Retiree Medical Benefits.....	<u>43</u>

## **Section 1. Introduction**

### **1.1 Purpose of the Plan**

This plan sets forth the compensation and benefits-related personnel policies applicable to the City of Pleasanton's ("City") management and confidential employees.

### **1.2 Preparation of the Plan**

The City Manager shall be responsible for the preparation of the plan. The City ~~of Pleasanton~~ reserves the right to make changes to the plan at the discretion of the City Manager. As necessary, the City Manager shall submit the plan to the City Council for its approval.

## **Section 2. Management and Confidential Classifications**

The management and confidential classifications covered by this compensation plan are listed in Appendices A and B, *Management Control Points and Confidential Control Points*, respectively. All classifications covered by this compensation plan are employed on an "at will" basis and serve at the pleasure of the City Manager.

## **Section 3. Salaries**

### **3.1 Plan Effective Date**

Effective the first full pay period of September 1, 201~~8~~<sup>4</sup> the control points for all management and confidential classifications are as reflected in Appendix A and Appendix B.

### **3.2 Performance Based Compensation**

The following is a description of the basic tenets of the City's performance pay plan for management and confidential employees.

## **A. Salary Ranges and Control Points**

Salary ranges have been established for each management and confidential classification. The mid-point of the salary range is designated as 100% of Control Point; the minimum and maximum points of the range are designated 80% and 120% of Control Point respectively. An employee can expect to attain 100% of Control Point. Control Points for all classifications are listed in Appendix A (Management) and Appendix B (Confidential).

Any adjustment to salary ranges will normally take place during the budget process, taking into consideration market and other influences such as increases granted managers among like agencies within the neighboring geographic area, increases granted the City's represented employees, internal relationships between supervisory positions and across departments, etc. The salary range adjustment will not automatically result in any adjustment to an individual employee's salary unless a reclassification or job change results.

(For market survey purposes, which will be conducted periodically, the City uses a 104% control point to compare to the top step of agencies using the step system.)

## **B. Compa-Ratio**

A compa-ratio shall be computed for each employee. The compa-ratio represents the relationship of each employee's current salary to the control point of his or /her/their salary range. The compa-ratio is calculated by dividing the employee's current salary by the control point of his or /her/their salary range.

## **C. Performance Zones**

The City strives to place employees in the performance zones recommended by Department Heads and approved by the City Manager. The descriptions below serve as guidelines and an employee's placement in a performance zone may be impacted by fiscal, market and other factors.

Each salary range shall be divided into four performance zones as follows:

**Zone One (80% through 95% of control point):** New employees are typically hired within this zone. However, where circumstances warrant, employees may be hired up to or above the control point.

**Zone Two (96% through 104% of the control point):** An employee may normally expect to progress within this portion of the salary range. Most employees will achieve and maintain a salary within this portion of the range.

**Zone Three (105% through 111% of the control point):** Only those employees whose performance, over time, exceeds expectations will achieve and maintain a salary that falls within this portion of the range.

**Zone Four (112% through 120% of the control point):** Only those employees whose performance, over time, far exceeds expectations will achieve and maintain a salary that falls within this portion of the range.

#### **D. Merit Increase Guide**

Merit salary increases may be considered on an annual basis, generally in the month of September, based upon the recommendation of the supervisor and Department Head, and the following general guidelines:

- Increase amounts may differ as performance levels increase.
- Merit increases shall be based solely upon performance and no salary increase shall be made unless a performance appraisal has been completed for the employee.
- No salary increase shall be awarded in instances where overall performance falls below an acceptable standard.

#### **E. Merit Increase Pool**

Each year, as appropriate, based upon the recommendation of the City Manager and as approved by the City Council, there shall be established a merit increase pool. The merit increase pool is a percentage of total base management and confidential employees' salaries. This pool funds the management and confidential employee

salary increases. The aggregate of all merit increases distributed will generally equal the merit increase pool.

Appendix C outlines the general timeline for processing salary range, merit increase and any other compensation related adjustments.

### **3.3 Salary Advancement**

Newly appointed management or confidential employees shall be eligible for a merit increase after one year of service and on each September thereafter. Said increases shall be made based solely on performance and in accordance with the merit increase guide.

### **3.4 Salary Upon Promotion**

When a management or confidential employee is promoted, he or /shethey shall be assigned a salary within the new classification salary range that is at least five percent above the salary held in his or /hertheir former classification. For purposes of setting salaries, incentive pay the employee received in the former classification, but lost at the time of promotion to the new class, will be considered when calculating the minimum five percent increase.

The City Manager has final approval authority over all matters related to compensation.

## **Section 4. Special Compensation**

### **4.1 Management Bonus Programs**

A bonus may be granted in recognition of a management employee's specific accomplishments demonstrating exceptional and significant leadership or management related to:

- Completing a significant community or organizational project or program;

- Completing a major organizational change resulting in significant cost savings;  
or
- Completing a significant improvement to customer service benefiting the
  - community or the organization.

To be granted a bonus, the employee's leadership or management must be beyond the high expectations of the management staff and be for a project/program that was substantially completed during the past year. All bonuses granted shall be in the form of a one-time payment. The total of all bonuses granted shall not exceed \$75,000 annually, unless a different amount is authorized during the budget process.

Administration of the bonus program is included as Appendix G. The bonus program is discretionary and may be suspended as deemed appropriate by the City Manager.

#### **4.2 Overtime - Confidential Employees**

Confidential employees assigned by their supervisor to work beyond the hours of their regular work day shall be entitled to overtime compensation for all hours so worked, provided, however, that the overtime rate shall be computed at one-and-one-half times the employee's regular rate of pay as calculated to the nearest 15-minute up to 30 minutes, and the nearest minute thereafter. Confidential employees may be compensated for overtime worked either by monetary payment or by compensatory time off, at the option of the employee. Compensatory time shall accrue at the rate of one-and-one-half times the overtime hours worked. Compensatory time off which accrues in excess of 50 hours must be liquidated by monetary payment. All monetary payments for overtime must be paid no later than the next biweekly payroll following the pay period in which the overtime was worked. Utilization of compensatory time off shall be by mutual agreement between the Department Head or ~~his or her~~ designee and the employee. Upon separation of employment, the employee shall be paid for ~~his or her~~ their unused compensatory time.

Once a year, confidential employees may be paid for all accrued compensatory time. Said payments shall be made on the first payday in December. Written requests for payment must be made by the employee 15 days in advance of the first payday in

December.

Part-time employees working less than eight hours in a day shall not be compensated for overtime or compensatory time off unless said employee exceeds 40 hours in a workweek.

#### **4.4 Temporary Assignment**

Employees assigned additional significant or complex duties for at least five (5) consecutive work days may receive compensation on a temporary basis of up to 10% percent above their hourly wage upon the recommendation of the Department Head and approval by the City Manager. The Department Head will use discretion and judgment in recommending employee temporary pay, balancing the need for development and experience with the operational needs of the Department.

#### **4.5 Bilingual Pay**

~~Effective July 5, 2014, f~~For designated ~~C~~confidential positions, the City ~~will~~ ~~establish~~has established a Bilingual Pay program for employees certified as bilingual in languages determined by the City as necessary or desired to serve the Pleasanton community. The employees will receive a premium of fifty dollars (\$50) per pay period.

### **Section 5. Health and Welfare**

#### **5.1 Prorated Benefits**

Unless otherwise specified, employees who work less than full-time will receive prorated benefit contributions. The City will contribute fifty percent (50%) towards monthly contributions for employees who work between twenty (20) and twenty-nine (29) hours, and seventy-five percent (75%) for employees who work between thirty (30) and thirty-nine (39) hours on a regular basis.

#### **5.2 Medical Insurance - Active Employees**

##### **A. Contributions**



~~The City will continue to contribute for each employee a monthly amount no greater than the family rate of the lowest cost HMO.~~

All employees participating in the City's health plans will contribute one of the following two amounts, whichever is greater:

1. \$25 per month for employee only coverage, \$25 per month for employee plus one coverage, or \$50 per month for family coverage.
2. The difference between the family rate of the lowest cost HMO and the premium of the employee's more expensive plan selection.

Contributions will be deducted from the employee's paycheck on a pre-tax and bi-weekly basis.

#### **B. Increases in Premiums**

The City will pay for any increase in the medical plan premiums up to a maximum of 15% annually of the lowest cost HMO family rate. Any premium increase above 15% will be deducted from the employee's paycheck on a pre-tax basis.

In the event that the medical premium increase is less than 15%, the City's sole obligation is to pay the lower percentage increase.

#### **C. Plan Co-Pays**

The health maintenance organization (HMO) medical plans co-pays shall be ten dollars (\$10) for office visits. The prescription drug co-pays shall be ten dollars (\$10) for generic, fifteen dollars (\$15) for brand and thirty-five dollars (\$35) for non-formulary (the Kaiser HMO provides for a two-tier prescription drug plan). The Preferred Provider Organization (PPO) medical plan co-pays shall be fifteen dollars (\$15) for office visits. The prescription drug co-pays shall be ten dollars (\$10) for generic, twenty-five (\$25) for brand and thirty-five dollars (\$35) for non-formulary.

#### **D. Changes to Plan Designs**

The City reserves the right to make changes to the medical plan designs.

### 5.3 Retiree Medical Benefit Eligibility

Employees who retire from the City of Pleasanton (~~i.e.~~ under the California Public Employees Retirement System ("CalPERS") ~~retirement system~~, Government Code Section 20000 et seq.) are eligible for retiree medical benefits. Retirement from the City of Pleasanton means a retirement effective date through CalPERS no more than 120 calendar days after separation from the City of Pleasanton. Retirees who subsequently rescind their CalPERS retirement forfeit this retiree medical benefit eligibility.

#### A. **Calculation of Total Service**

The total years of PERS service will be evidenced by the "Years of Service Credit" category indicated on the CalPERS annual member statement or validated by CalPERS at the time of retirement.

##### 1. **Managers hired prior to January 1, 2009 (Prior Service)**

Managers hired prior to January 1, 2009, who work a minimum of five years with the City of Pleasanton, are eligible to count prior years of service completed with another PERS municipal agency toward service requirements for retiree medical benefits.

Employees hired before January 1, 2009 who promote to management positions may count prior years of service completed with another CalPERS municipal agency for the retiree medical benefit.

##### 2. **Managers hired after January 1, 2009**

Managers hired after January 1, 2009, who work a minimum of five years with the City of Pleasanton, are eligible for retiree medical insurance benefits based on City of Pleasanton years of service only.

#### B. **Spouse/Eligible Dependent Continuation of Benefits**

In the case where the employee eligible for two-party coverage is deceased, the amount the City is obligated to pay shall be reduced by one-half (1/2). If a

spouse remarries, the obligation by the City shall terminate. Domestic partners shall be treated in the same manner as spouses for continuation of benefits.

**C. Vesting Schedule for Employees Hired Before January 21, 2009**

**1. Service Retirement**

For all employees who retire ~~via on~~ a service retirement from the City of Pleasanton, the City shall pay four percent (4%) for each year of service of the City's contribution toward the monthly premium for employee and one dependent.

For all service retirements the formula accelerates beginning with 10 years of service as illustrated below:

<b>Years of Service</b>	<b>City's Contribution</b>
10	75%
15	80%
20	90%
25 + years of service	100%

**2. Disability Retirement**

For all employees who retire ~~via on~~ a disability retirement, the City shall pay a percentage of the City's contribution toward the monthly premium for employee and one dependent in accordance with the schedule set forth below:

<b>Years of Service</b>	<b>City's Contribution</b>
10	20%
11	25%
12	30%
13	35%
14	40%
15	45%
16	48%
17	51%

18	54%
19	57%
20	80%
21	84%
22	88%
23	92%
24	96%
25 + years of service	100%

### **3. City Contributions**

The City's contribution for retiree medical coverage is established as the same dollar contribution paid for active employees at the employee plus one rate of the lowest cost HMO early retiree plan.

### **4. Reimbursement for non-City Plans**

In the event that a retiree obtains medical coverage through a plan not offered through the City of Pleasanton, the City will reimburse the retiree up to the eligible amount, but no more than the amount paid by the retiree. Retirees must supply proof of coverage and proof of payment in order to be reimbursed.

### **5. Benefits for Medicare Eligible Retirees**

All retirees eligible for Medicare are required to apply for Medicare benefits. Upon qualifying for and receiving parts A and B of Medicare, the City shall not be obligated to contribute an amount in excess of -the monthly premium for the lowest cost HMO health plan supplement to Medicare for employee and one dependent.

## **DE. Vesting Schedule for Employees Hired on or After January 21, 2009**

### **1. Service Retirement**

For all employees who retire ~~on a~~ via a service retirement from the City of Pleasanton, the City shall pay four percent (4%) for each year of service of the City's contribution toward the monthly premium for single coverage.

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For all service retirements the formula accelerates beginning with 10 years of service as illustrated below:

<b>Years of Service</b>	<b>City's Contribution</b>
10	75%
15	80%
20	90%
25+ years of service	100%

In accordance with the Public Employees' Pension Reform Act of 2013 (PEPRA), employees hired on/after January 1, 2013 and considered "new members" by CalPERS will have a vesting schedule equal to the vesting schedule of miscellaneous employees.

## **2. Disability Retirement**

For all employees who are hired on or after January 21, 2009 and retire via a a disability retirement, the City shall pay a percentage of the City's monthly contribution toward the premium for single coverage in accordance with the schedule set forth below:

<b>Years of Service</b>	<b>City's Contribution</b>
10	20%
11	25%
12	30%
13	35%
14	40%
15	45%
16	48%
17	51%
18	54%
19	57%

20	80%
21	84%
22	88%
23	92%
24	96%
25+ years of service	100%

### **3. Public Employee Pension Reform Act (2013)**

In accordance with PEPRA, employees hired on or after January 1, 2013 and considered “new members” by CalPERS will have a vesting schedule equal to the vesting schedule of miscellaneous employees.

### **4. City Contributions**

The City’s contribution for retiree medical coverage is established as the same dollar contribution paid for active employees at the single rate of the lowest cost HMO early retiree plan.

### **5. Reimbursement for non-City Plans**

In the event that a retiree obtains medical coverage through a plan not offered through the City of Pleasanton, the City will reimburse the retiree up to the eligible amount, but no more than the amount paid by the retiree. Retirees must supply proof of coverage and proof of payment in order to be reimbursed.

### **6. Benefits for Medicare Eligible Retirees**

Retiree health benefits, including reimbursement, will cease once the employee becomes Medicare eligible.

### **7. Retiree Health Savings Plan**

For employees hired after January 21, 2009, the City will contribute seventy-five dollars (\$75) per month to the employee’s RHSP. Additionally, each employee eligible for the City contribution will have a mandatory, pre-tax deduction of

twenty-five dollars (\$25) per month toward the RHSP. The total monthly contribution to the RHSP will be one hundred dollars (\$100).

Employees have a vested right to the funds at the time of deposit. Funds deposited in the RHSP are portable and belong to the employee, regardless of length of service or reason for separation.

#### **5.4 Dental**

The City shall contribute an amount necessary to provide the current dental care benefits with an annual maximum of \$2000 for individual employees and eligible dependents. The City shall provide a lifetime maximum orthodontia coverage of \$2,000 for individual employees and eligible dependents.

#### **5.5 Life Insurance**

The City shall contribute an amount necessary to provide coverage equal to twice the employee's annual salary up to a maximum of \$100,000 life and \$100,000 accidental death and dismemberment insurance. For purposes of this benefit, the City's contribution is not prorated for part-time regular employees.

Employees may purchase, at the employees' own expense and within the limits set by the insurance carrier, additional amounts of life insurance under the existing policy.

#### **5.6 Short-Term/Long-Term Disability Insurance**

The City shall provide short-term/long-term disability insurance coverage at the employee's expense for management employees and at the City's expense for confidential employees.

There is a 14-day waiting period for short-term disability and a 6-month waiting period for long-term disability.

The maximum short-term disability benefit is \$2,500 per week for management and \$1,500 per week for confidential employees.



The maximum long-term disability benefit is \$10,000 per month for management and \$6,500 per month for confidential employees.

## **5.7 Vision Care**

The City shall provide a vision care plan to employees and eligible dependents enrolled in health plans that do not include vision examination and corrective eyewear.

## **Section 6. Leaves**

### **6.1 Prorated Benefits**

Unless otherwise specified, regular employees who work less than full-time will receive prorated leave.

### **6.2 Holidays**

#### **A. Observed Holidays**

Annual observed holidays are as follows:

- A. January 1, known as "New Year's Day"<sup>st</sup>
- B. The third Monday in January, known as "Martin Luther King, Jr. Day"
- C. The third Monday in February, known as "Presidents Day"
- D. The last Monday in May, known as "Memorial Day"
- E. July 4, known as "Independence Day"<sup>th</sup>
- F. The first Monday in September, known as "Labor Day"
- G. November 11, known as "Veterans Day"<sup>th</sup>
- H. Thanksgiving Day
- I. The Friday following Thanksgiving Day
- J. December 24, known as "Christmas Eve"<sup>th</sup>
- K. December 25, known as "Christmas Day"<sup>th</sup>

See Appendix D for policies applicable to Fire Battalion Chief and Appendix E for policies applicable to Police Lieutenants.

## **B. Holidays Falling on Saturday, Sunday or Scheduled Day Off**

When a holiday falls on a Sunday, the following Monday shall be observed; when a holiday falls on a Saturday, the preceding Friday shall be observed; except that

- a) If December 24<sup>th</sup> is on a Saturday or Sunday, the preceding Friday shall be observed.
- b) If December 25<sup>th</sup> is on a Saturday (December 24<sup>th</sup> is on Friday), the following Monday shall be observed.

If a holiday falls on a management employee's scheduled day off, ~~his or her~~their administrative leave entitlement shall be credited eight hours. If a holiday falls on a Saturday or Sunday and is the management employees' regularly scheduled work day, the employee may opt to observe the holiday that day with approval of the Department Head. If a holiday falls on a confidential employee's scheduled day off, compensatory time off shall be granted or, at the option of the employee, compensation at a rate of pay equal to ~~his or her~~their regular rate of pay for the holiday.

### **6.3 Work on a Holiday**

In addition to their regular compensation for the holiday, management employees assigned by their supervisor to work on a holiday shall have their administrative leave entitlement credited in an amount equal to one and one half times the hours worked. This provision does not apply to Battalion Chief and Police Lieutenant classifications. See Appendix D for policies applicable to Battalion Chief and Appendix E for policies applicable to Police Lieutenant classifications.

Confidential employees assigned by their supervisor to work on a holiday shall be compensated for the holiday hours worked. Compensation shall be made either by monetary payment equal to twice that compensation established for regular time or by equivalent time off.

### **6.4 Floating Holidays**

Each management employee shall be credited with seven floating holidays (56 hours) on January 1<sup>st</sup> of each year. Each ~~C~~confidential employee shall be credited with four

floating holidays (32 hours) each year effective January 2014. Floating holidays must be taken in the calendar year or are lost. See Appendix D for policies applicable to Fire Battalion Chief and Appendix E for policies applicable to Police Lieutenant classifications.

Management employees hired January 1 through June 30 shall be credited with seven floating holidays (56 hours) upon hire. New employees hired July 1 through December 31 shall be credited with three floating holidays (24 hours) upon hire.

Confidential employees hired January 1 through June 30 shall be credited with four floating holidays (32 hours) upon hire. New Confidential employees hired July 1 through December 31 shall be credited with two floating holidays (16 hours) upon hire.

## **6.5 Vacation**

### **A. Vacation Eligibility/Allowance**

Management and confidential employees shall accrue vacation with pay in accordance with the following schedule:

<u>Years of Service</u>	<u>Monthly Accrual Rate</u>	<u>Per Pay Period</u>
First through fourth	6.667 hours	3.08
Fifth through ninth	10.000 hours	4.62
Tenth through fourteenth	13.334 hours	6.16
Fifteenth	14.000 hours	6.47
Sixteenth	14.667 hours	6.77
Seventeenth	15.334 hours	7.08
Eighteenth	16.000 hours	7.39
Nineteenth and above	16.667 hours	7.70

The maximum monthly accrual rate shall be 16.667 hours. See Appendix D for policies applicable to Fire personnel.

### **B. Vacation Leave**

## **1. ~~New~~ Vacation Cap**

~~Effective February 2, 2013,~~ the vacation cap ~~is shall be established at~~ four hundred (400) hours. ~~Thereafter,~~ at any time an employee reaches four hundred (400) hours, the employee shall cease accruing vacation until such time as their balance falls below the cap. ~~After February 2, 2013, no employee shall be allowed to accrue vacation hours above the cap.~~ However, in the event an employee has requested to take vacation but been denied or other circumstances prevented the employee from taking vacation, the employee may submit a written request to the City Manager, or designated Assistant City Manager, for special consideration to carry over vacation balances beyond four hundred (400) hours.

## **2. Separate Vacation Bank**

Effective September 1, 2012, any accrued vacation in excess of three hundred (300) hours shall be placed in a separate Vacation Bank for each affected employee. Employees shall be entitled to use or sell the hours in the Bank for vacation or for extended leave in the same manner as regular vacation hours. The hours shall be paid out at the pay rate of the employee when ~~used~~utilized.

## **C. Vacation Schedule/Usage**

1. The scheduled use of vacation shall be approved in advance by the employee's supervisor.
2. Except for confidential employees, vacation leaves of less than the employee's regular workday shall not be deducted from the employee's accrued vacation leave balance.
3. Management and confidential employees may not use accumulated leave to end service prior to retirement or separation from the City, unless authorized by the City Manager.

## **D. Vacation Sell Back**

Management and confidential employees may request to sell back up to two hundred and forty (240) hours of accrued vacation in each calendar year. Employees may sell accrued time in one (1) hour increments with a minimum of

eight (8) hours on the first pay day in March, June, September and December of each year.

## **6.6 Sick Leave**

### **A. Sick Leave Accrual**

1. Management and confidential employees shall earn sick leave at the rate of eight hours for each month of service to a maximum accumulation of 1,440 hours of sick leave. Hours accumulated in excess of 1,440 are applied toward additional years of service under the current CalPERS "Credit for Unused Sick Leave", Government Code, Section 20965. Hours accumulated in excess of 1,440 will not be credited as paid time off until such time as the accumulated sick leave balance falls under the 1,440 hour threshold.

See Appendix D for policies applicable to Fire personnel.

2. An employee on leave of absence with pay in lieu of temporary disability payments pursuant to Section 4850 of the Labor Code shall accumulate sick leave during said leave of absence, in accordance with the provisions of that section.

### **B. Sick Leave Usage**

1. Management and confidential employees shall be eligible for sick leave with pay. Sick leave shall not be considered a right, which an employee may use at his ~~or~~ her ~~their~~ discretion, but shall be allowed only as follows:
  - a. In cases of necessity and actual sickness or disability;
  - b. For medical and dental appointments, at the discretion of the employee's supervisor;
  - c. For a maximum of 80 hours of sick leave per calendar year in which a member of the employee's immediate family meets the criteria in section B.1.a or B.1.b. Immediate family shall consist of the spouse, domestic partner, children, children of a domestic partner, parents, or other individuals whose relationship to the employee is that of a dependent or near dependent. This provision does not apply if the family sickness or disability occurs while the employee is on vacation;

- d. Employees eligible for temporary disability payments may use accumulated sick leave until eligible for short-term disability benefits in order to maintain his or her/their regular income, or may use accumulated sick leave in-lieu of short-term or long-term disability benefits during the duration of the approved medical leave.

## 2. Absences for a Regular Work~~d~~ Day or Longer

When an absence is for an employee's regular workday or longer, the employee may be required to file a physician's certificate or a personal affidavit with the Assistant City Manager/Administrative Services Director stating the cause of the absence.

## 3. Absences of Less Than a Regular Work~~d~~ Day

Except for confidential employees, absences due to illness or disability of less than the employee's regular workday shall not be deducted from the employee's accrued sick leave balance.

### C. Sick Leave Conversion

In lieu of the CalPERS "Credit for Unused Sick Leave Option" employees may, during their final year of service prior to retirement from the City, convert their unused sick leave to additional years of service in the computation of their Section 5.3 Retiree Medical Benefit. For each hour converted, the employee shall receive one half (1/2) hour of additional service time.

### **6.74 Administrative Leave**

In recognition that management employees are required to work hours beyond their regular hours of work to fulfill their management responsibilities, each management employee shall be credited with seven days (56 hours) of administrative leave per year on the first pay date in January of each year or upon hire (see Appendix D for provisions that govern the Livermore-Pleasanton Fire Department ["LFPD"]). In addition, the City Manager may, as recommended by the Department Head, grant up to three more administrative leave days (24 hours) per year (for a total of 10 days/80

hours) in instances in which a management employee was required to devote substantially more time during the previous year than anticipated to fulfill ~~his or her~~ his or /her their duties. The additional three days (24 hours) are normally granted to these employees in the fall of each year.

Managers may choose to be paid for one-half of their unused administrative leave on the first pay day in May and for all of their unused administrative leave on the first pay day in November. All managers with unused administrative leave as of December 31~~st~~ will be paid for said leave during the first pay period in January of the succeeding year.

### **6.85- Bereavement Leave**

In the event of a death in the immediate family, employees may take paid bereavement leave of up to forty (40) hours. Additionally, employees may utilize other paid leaves to extend bereavement leave, subject to approval of the City Manager.

In this context only, immediate family shall be defined as: spouse, domestic partner, child, foster child who resided with the employee at the time of ~~his or her~~ his or /her their death, stepchild, mother, father, stepmother, stepfather, mother-in-law, father-in-law, brother, stepbrother, sister, stepsister, brother-in-law, sister-in-law, grandmother, grandfather, spouse's grandmother, spouse's grandfather, son-in-law, daughter-in-law or grandchildren.

### **6.95 Leaves of Absence**

#### **A. Leaves of Absence ~~w~~Without Pay**

The City Manager may grant a management or confidential employee a personal leave of absence without pay or seniority for unique personal reasons for a period not to exceed three months. Said leave shall not be granted unless requested in writing. Upon expiration of an approved leave, the employee shall be reinstated to the same or similar position held at the time leave was granted. Failure to report to work upon expiration of leave or within a reasonable time after notice to return to duty shall be cause for discipline up to and including termination. Department Heads may grant

management and confidential employees leave of absence without pay for not to exceed one calendar week. Said leaves shall be reported to the ~~Assistant City Manager/Administrative Services Director~~Director of Human Resources and Labor Relations.

During said leave, an employee shall not accrue vacation or sick leave benefits or be eligible to be paid for holidays, nor shall such time be considered as service time.

#### **B. Jury Leave**

Management and confidential employees called or required to serve as a juror or whose presence is required in court as a result of being called for jury duty shall be entitled to paid leave from ~~his or /her~~their duties with the City during the period of such service. The employee shall be paid the difference between ~~his or /her~~their full salary and any payment received, except travel, for such duty.

#### **C. Military Leave**

Military leave shall be granted in accordance with the provisions of federal and state law, and by Council Resolution 01-112. All employees entitled to military leave shall give the Department Head and City Manager an opportunity within the limits of military regulations to determine when such leave shall be taken.

#### **D. Extended Medical Leave**

An employee who is temporarily disabled from work due to a medical condition may, upon written request to the ~~Assistant City Manager/Administrative Services Director~~Director of Human Resources and Labor Relations, be granted by the City Manager a leave of absence without pay for a period not to exceed 12 weeks beyond the exhaustion of any accrued sick and vacation leave except as provided by federal and state medical leave law. Upon a recommendation by the Department Head, the City Manager may extend the leave for up to an additional four weeks. Such request for medical leave will be considered only upon provision of a physician's statement attesting to said disability and in conformance with applicable state and federal leave laws.



During extended medical leave, an employee on an unpaid status shall not accrue vacation or sick leave benefits or be eligible to be paid for holidays, nor shall such time be considered as service time. Any employee returning from medical leave shall be required to provide a physician's release to return to duty. In addition, health benefits may be discontinued effective the first of the month following the expiration of any protected leave (e.g., [the Family and Medical Leave Act \["FMLA"\]](#)).

#### **E. Family Leave**

Employees shall be eligible for family leave in accordance with the City's *Family Care and Medical Leave Policy*.

### **Section 7. Retirement**

#### **7.1 Membership**

All eligible management and confidential employees shall be members of the [California](#) Public Employees' Retirement System ([CalPERS](#)).

#### **7.2 Retirement Plans**

The specific plans provided management and confidential employees are as follows:

**A.** Miscellaneous management and confidential employees shall be provided the PERS 2.7% @ 55 plan to include the following options: 1959 Survivor Benefit to include Section 21382.2 benefits, credit for unused sick leave, highest one year compensation, and military buyback options.

~~(1)~~ —

Miscellaneous management and confidential employees hired on or after January 1, 2013 and considered "new members" by CalPERS shall be provided the PERS plan dictated by PEPR.

— Fire safety management employees hired on or before December 21, 2012 shall

be provided the PERS 3% @ 50 plan to include the following options: 1959 Survivor Benefit, credit for unused sick leave benefit, highest one year compensation, and military buyback options.

B.

Fire safety management employees hired on or /after December 22, 2012 shall be provided the PERS 3% @ 55 plan with the highest three year average compensation, 1959 Survivor Benefit, credit for unused sick leave benefit, and military buyback options.

Fire safety management employees hired on or /after January 1, 2013 and considered “new members” by CalPERS shall be provided the CalPERS plan dictated by PEPRA.

~~0.~~ Police safety management employees hired on or /before July 6, 2012 shall be provided the CalPERS 3% @ 50 plan to include the following options: 1959 Survivor Benefit, credit for unused sick leave benefit, highest one year compensation, and military buyback options.

C.

Police safety management employees hired on or /after July 7, 2012 shall be provided the CalPERS 3% @ 55 plan with the highest three year average compensation, 1959 Survivor Benefit, credit for unused sick leave benefit, and military buyback options.

Police safety management employees hired on or /after January 1, 2013 and considered “new members” by CalPERS shall be provided the CalPERS plan dictated by PEPRA.

### **7.3 Payment - Employee's Contribution**

#### **A. Current Employees**

The City shall discontinue payment of the employee's contribution to CalPERS Employer Paid Member Contribution ("EPMC"). Employees will pay the 8% or 9% employee's contribution to CalPERS.

#### **B. New Employees**

New employees hired after January 1, 2013 and considered "new members" by CalPERS shall pay the member contribution in accordance with PEPR.

### **Section 8. Uniforms**

The City shall provide up to 100% of the initial purchase price of uniforms subject to approval by the Department Head and City Manager, for new management employees required to wear one. For the classifications of Fire Chief, Deputy Fire Chief, Battalion Chief, Fire Marshal, Assistant Fire Marshal, and Emergency Preparedness Manager, the City shall provide an annual uniform allowance equal to the amount provided to prevention bureau employees of the LPFD. For the classifications of Police Chief, Police Captain and Police Lieutenant, the City shall provide an annual uniform allowance equal to the amount provided to sworn officers of the Police Department. In the event the uniform allowance paid to non-management employees increases, the City Manager will also increase the manager's allowance.

### **Section 9. Deferred Compensation**

The City shall provide a voluntary Internal Revenue Code ("IRC") 457 deferred compensation plan for management and confidential employees and a voluntary Internal Revenue Service ("IRS") 401A plan for management employees.

The City may provide deferred compensation contributions for management and confidential employees. Any funds deposited in a deferred compensation plan under this provision belong to the employee, regardless of length of service or reason for separation.

The City shall contribute one and one-half percent of the employee's base compensation into a 457 deferred compensation plan. Effective January 12, 2019, the City shall contribute an additional one-half percent for a total of two percent. City contributions are tax deferred, and count towards the 457 annual maximum deferral as designated by the IRS. Employees without an existing 457 account with a City sponsored provider must establish one in order to receive the City contribution, but no employee contribution to the account is required.

### **Section 10. Tuition and Book Reimbursement**

Upon approval of the Department Head and City Manager, management and confidential employees shall be reimbursed tuition expenses for job-related courses successfully completed with a grade of "C" or better from a credited colleges or universities. — university accredited by the Western Association of Schools and Colleges ("WASC") Accrediting Commission for Community and Junior Colleges or the WASC Senior College and University Commission one of the Association of Schools and Colleges (standardized list of Associations established by the Human Resources Department).

The maximum amount of tuition and fee reimbursement an employee can receive per fiscal year shall not exceed reimbursement per year shall equal the total tuition and fees<sup>1</sup> levied by California State University East Bay University for the academic year beginning in the fall of each year. —The "academic year" is currently defined as the "fall semester and the spring semester."

Management and confidential employees can be reimbursed for books required for college or /university courses approved by the City Manager and successfully completed with a grade of "C" or better. The maximum reimbursement for books an employee may receive shall not exceed \$300.~~00~~ per fiscal year.

<sup>1</sup> The reimbursable fees are the Student Body Fee, IRA Fee, Facility Fee, University Union Fee, ID Fee and University Union Recreational Fee.

To be reimbursed, the employee must submit receipts from the college or university and proof of grades received.

### **Section 11. Education Incentive Pay**

Upon reaching the control point of their salary grade, regular confidential employees shall be eligible for educational incentive pay for educational degrees from a college or university accredited by one of the Association of Schools and Colleges (standardized list of Associations established by the Human Resources Department) ~~from a accredited colleges or university accredited by the Western Association of Schools and Colleges ("WASC") Accrediting Commission for Community and Junior Colleges or the WASC Senior College and University Commission.~~ies. The degree must be beyond that required by the employee's classification. The amount of said pay shall be as follows:

- 2.5 % AA degree
- 5 % BS/BA degree

### **Section 12. Automobiles and Automobile Allowances**

#### **12.1 Automobiles**

The Police Chief and Fire Chief may be provided a vehicle for both business and limited personal use as defined by the City Manager. Managers receiving a car allowance should provide proof of insurance showing liability coverage of at least \$100,000 per person, \$300,000 per incident to the Assistant City Manager on an annual basis.

#### **12.2 Automobile Allowance**

The purpose of the automobile allowance is to compensate managers for using their personal vehicles on a regular basis for business needs. The allowance is intended to cover all expenses associated with vehicle use including, but not limited to fuel, insurance (and any associated claims), maintenance and repairs.

Managers in the following classifications shall receive a monthly vehicle allowance of \$200.00 as compensation for providing and using their personal vehicles for City business and are not eligible for mileage compensation:

- Assistant City Attorney
- Assistant City Manager
- Assistant Director of Operations Services
- Assistant to the City Manager
- Chief Building Official
- City Clerk
- Recreation Manager
- Deputy Director, Community Development/City Engineer
- Deputy Director, Community Development/Planning Manager
- Deputy Director, Community Development/Traffic Engineer
- Director of Economic Development
- Director of Finance
- Director of Human Resources and Labor Relations
- Director of Library and Recreation
- ~~Director of Community Services~~
- Director of Community Development
- Director of Operations and Water Utilities Services
- Human Resources Manager
- Information Technology Manager
- Permit Center Manager
- Utilities Superintendent

Managers ~~who~~ receive a monthly car allowance are eligible to participate in the Rideshare Program and receive the two dollars \$2 per /day cash incentive provided they are the "driver" of a carpool or use a commute alternative when their personal vehicle is not needed on-site for business use. Managers will be eligible for the

monthly cash drawings if the participation rate equals 50% or more of the days worked that month.

**Section 13. Miscellaneous**

**13.1 Physical Examination/Wellness Program**

The City shall reimburse management employees for the cost of an annual physical examination. The amount of the reimbursement shall not exceed \$375.00 per year.

**13.2 Part-Time Employees**

Management and confidential employees employed on at least a regular one-half time basis shall receive prorated benefits as determined by the City Manager.

Distribution approved:

\_\_\_\_\_  
Nelson Fialho, City Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
Distribution date

**Appendix A**  
**Management Control Points<sup>2</sup>**

<u>Classification</u>	<u>Control Point</u>
Accounting Manager	9,665
Administration Manager-Fire	11,496
Assistant Director of Operations	12,868
Assistant City Attorney	14,341
Assistant City Manager	15,840
Assistant Director Finance	13,230
Assistant Director <u>of</u> Library and Recreation	12,381
Assistant Fire Chief	15,995
Assistant Fire Marshal	12,203
Assistant To the City Manager	11,496
Assistant Utility Superintendent	10,142
Battalion Chief	13,908
Business & Facilities Manager	12,381
Chief Building Official	14,117
City Clerk	13,301
Community Relations Manager/PIO	9,665
Recreation Manager	10,142
Construction Services Manager	11,123
Deputy City Clerk	8,271
Deputy Community Development Director/Traffic Engineer	13,676

<sup>2</sup> Control points effective September 8, 2018.



Deputy Fire Chief	15,995
Development Services Manager	11,213
Director of Community Development	16,493
Director of Economic Development	15,726
Director Of Engineering Services/City Engineer	15,726
Director of Finance	15,829
Director Of Human Resources And Labor Relations	15,726
Director Of Information Technology	15,726
Director of Library and Recreation	15,726
Director of Operations and Water Utilities	15,733
Economic Development Specialist	..9,665
Emergency Medical Services (EMS) Manager	10,319
Emergency Preparedness Manager	10,142
Environmental Services Manager	11,123
Financial Services Manager/Accounting	12,028
Financial Services Manager/Treasury	12,028
Fire Chief	17,212
Fire Marshal	15,995
Housing Division Program Manager	11,827
Human Resources Manager	12,439
Management Analyst	..9,665
Operations Superintendent	11,700
OSD Training and Emergency Services Manager	10,142
Park Maintenance Superintendent	11,700

Permit Center Manager	12,708
Planning Manager/Deputy Community Development Director	14,117
Police Captain	15,995
Police Chief	17,555
Police Lieutenant	13,622
Police Support Services Manager	10,142
Principal Analyst	11,496
Revenue Manager	9,665
Senior Civil Engineer	12,028
Senior Transportation Engineer	11,891
Special Projects Manager	13,230
Special Projects Manager-Finance	10,322
Utilities Superintendent	11,757
Utility Planning Manager	12,028

**Appendix B**  
**Confidential Control Points<sup>3</sup>**

<b><u>Classification</u></b>	<b><u>Control Point</u></b>
Administrative Assistant	6,970
Executive Assistant	8,382
Human Resources Coordinator	7,575
Human Resources Technician	6,970
Office Assistant	5,765
Payroll Coordinator	7,215
Senior Office Assistant	6,354

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<sup>3</sup> Control points effective September 8, 2018.

## Appendix C

### Management and Confidential Base Salary Plan Schedule

**Performance Management Plan:** The performance pay plan is intended to follow the following time schedule:

<u>Timing</u>	<u>Activities</u>
---------------	-------------------

<u>August</u>	<u>Performance Evaluation &amp; Planning</u>
---------------	--

- rate incumbent
- obtain approvals
- performance evaluation interview
- discussion of next year's objectives
- develop performance plan
- performance pay increases calculated and approved by City Manager

<u>Sept/October</u>	<u>September</u>	<u>Performance Pay Increase</u>
---------------------	------------------	---------------------------------

- City Manager finalizes and authorizes performance pay and administrative leave increases
- performance pay and administrative leave -increases communicated and implemented

<u>January/February</u>	<u>Midyear Reviews</u>
-------------------------	------------------------

- modify objectives where necessary
- manager/incumbent discussion of job expectations

<u>February/March</u>	<u>Salary Structure Review</u>
-----------------------	--------------------------------

- existing salary ranges/structure examined vis-à-vis employment market and internal relationships for possible salary structure adjustments and incorporation into the following year's budget.

<u>July</u>	<u>Salary Structure Adjustment</u>
-------------	------------------------------------

- salary structure considered for adjustment and adoption during

budget process to reflect market and internal relationships

➤ merit increase pool approved

August \_\_\_\_\_ Repeat Performance Evaluation & Planning

## Appendix D

### Fire Department Management

#### Section 4. Special Compensation

##### Holiday In-Lieu Pay

Fire Battalion Chiefs assigned to a shift work schedule are eligible to receive holiday in-lieu pay at the rate of 7.5% of the base salary as special compensation as defined by CalPERS. Such compensation shall be paid in two installments. Such payments are to be made annually on the first payday after December 1 and the first payday after June 1.

##### Shift Differential Pay

Battalion Chiefs assigned to a work shift schedule shall be compensated in the amount equal to 7.5% of the Battalion Chief control point listed in Appendix A. Deputy Chiefs assigned to a 40 hour work week schedule shall be compensated in the amount equal to 2% of the Deputy Chief control point listed in Appendix A. Shift differential pay shall be paid biweekly.

##### Training Premium Pay

Battalion Chiefs assigned to a 40 hour work-week and train employees shall be compensated in the amount equal to 15% of the Battalion Chief control point listed in Appendix A and are eligible to observe annual holidays as listed in Section 6 of the Management Compensation Plan.

##### Acting Pay

A management employee assigned to perform the duties of a higher position classification as determined by the Fire Chief or City Manager for at least 30 days will receive at least 5% acting pay retroactively for all days so served. In the event a non-manager serves as an acting manager, the non-manager will be temporarily appointed to the appropriate

management classification. In no event shall an acting manager's salary be set above the control point of the higher classification. For temporary management appointments lasting more than 30 days, the employee shall also be entitled to administrative leave prorated for the time assigned to the higher classification.

### **Battalion Chief Coverage Stipend**

Effective November 1, 2010, Battalion Chiefs and Deputy Chiefs shall receive compensation of \$50 per hour (\$1,200 per shift) when providing shift coverage for the 24 hour Battalion Chief in his or her absence or position vacancy.<sup>4</sup>

### **Reimbursable Incidents & Training**

A Battalion Chief or Acting Battalion Chief who is either assigned to a reimbursable incident/training or is providing coverage for someone that has been assigned to a reimbursable incident/training shall be compensated at one and one-half (1 ½) times the employee's 24-hour rate of pay in 15\_-minute increments.

A Deputy Chief or Acting Deputy Chief who is assigned to a reimbursable incident /training or training shall be compensated at his or /her regular hourly rate of pay for each hour of reimbursable deployment.

## **Section 6. Leaves**

### **Floating Holiday**

The provisions of Section 6.1(3) of this Plan shall apply to Fire managers assigned to a 40-hour work schedule. With the exception that Fire managers will need to use all Floating Holiday hours by the last payroll period for the calendar year (instead of December 31<sup>st</sup>) otherwise they will be lost. Fire managers will be provided and may use the next calendar year's allotment of Floating Holiday hours in the same payroll period.

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<sup>4</sup> The Battalion Chief Coverage Stipend was approved temporarily by the City Manager on December 20, 2010 and extended until further notice on January 21, 2011.

## **Vacation**

Eligible Fire management personnel assigned to a shift work schedule shall accrue vacation with pay in accordance with the following schedule:

<b><u>Years of Continuous Service</u></b>	<b><u>Monthly Accrual Rate</u></b>
First through fourth year	12 hours
Fifth through eleventh	16 hours
Twelve through fourteenth	20 hours
Fifteenth through sixteenth	22 hours
Seventeenth year or more	24 hours

Eligible Fire management personnel assigned a 40 hour workweek shall accrue vacation with pay in accordance with the following schedule:

<b><u>Years of Continuous Service</u></b>	<b><u>Monthly Accrual Rate</u></b>
First through fourth year	8.57 hours
Fifth through eleventh	11.43 hours
Twelve through fourteenth	14.29 hours
Fifteenth through sixteenth	15.71 hours
Seventeenth year or more	17.41 hours

## **Administrative Leave**

In recognition that management employees are required to work hours beyond their regular hours of work to fulfill their managerial responsibilities, each employee in the classification of Fire Chief, Deputy Fire Chief, and Battalion Chief will receive 56 hours of administrative leave per year and may be credited up to a total of 80 hours of administrative time per year as recommended by the Fire Chief and approved by the City Manager. Fire Managers in the classification of Fire Chief, Deputy Chief and Battalion Chief appointed prior to October 1, 2010 shall continue to receive 80 hours annually.<sup>5</sup>

<sup>5</sup> The decrease in Administrative Leave from the 2009-2010 Management Comp Plan is in conjunction with the Battalion Chief Coverage Stipend approved temporarily by the City Manager on December 20, 2010 and extended on January 21, 2011 until further notice.

The Assistant Fire Marshal, Emergency Preparedness Manager and Management Analysts shall receive 56 hours of administrative leave per year. The Fire Chief shall annually recommend up to an additional twenty-four (24) hours per individual, and the City Manager may approve the amounts.

Administrative leave hours not used by the last payroll period of the calendar year will be cashed out.

### **Sick Leave Accrual**

Each 40\_-hour management employee shall earn sick leave at the rate of eight hours for each month of service to a maximum accumulation of 2,080 hours of sick leave. Hours accumulated in excess of 2,080 are applied toward additional years of service under the current CalPERS "Credit for Unused Sick Leave", Government Code, Section 20965. Hours accumulated in excess of 2,080 will not be credited as paid time off until such time as the accumulated sick leave balance falls under the 2,080 hour threshold.

Each 56\_-hour management employee shall earn sick leave at a rate of 11.2 hours for each month of service to a maximum accumulation of 2,912 hours of sick leave. Hours accumulated in excess of 2,912 will be used only to apply to additional years of service under the current CalPERS "Credit for Unused Sick Leave", government Code, Section 20965. Hours accumulated in excess of 2,912 will not be credited as paid time off until such time as the accumulated sick leave balance falls under the 2,912 hour threshold.



**Appendix E**  
**Police Department Management**

**Section 4. Special Compensation**

**Holiday In-Lieu Pay**

Police Lieutenants assigned to shift work or special assignments (subject to call out) are eligible to receive holiday in-lieu pay as special compensation as defined by CalPERS at the rate of 7.5% of the base pay and incentives. Such compensation shall be paid on a biweekly basis. Administrative leave for working holidays will not apply to Police Lieutenants.

**Special Events**

Lieutenants shall be authorized to supervise "special events" in accordance to parameters established by the Police Chief at the rate paid to a Police Sergeant at Step E (including all incentives at the highest levels).

**Peace Officer and Standards Training ("POST") Pay**

Lieutenants and Captains who possess a POST Management Certificate shall receive an amount equal to two and one-half percent (2.5%) of base pay effective as soon as administratively feasible. This amount will increase to a total of five percent (5%) effective January 4, 2014.

**Education Incentive**

Lieutenants and Captains who have received a Master's degree from an accredited school in a field as determined by the Chief of Police shall receive an amount equal to two and one-half percent (2.5%) of base pay effective July 5, 2014.

**Section 6. Leaves**

**Floating Holidays/Paid Time Off (Lieutenant Classification)**

Remaining Floating Holidays hours will be converted to Paid Time Off ("PTO") for Lieutenants at the time they receive holiday in-lieu pay. Thereafter, fifty-six hours of PTO will be credited

to each Lieutenant in January of each year. PTO must be used in the calendar year they are received and may not be cashed out. ~~In 2013 only, Lieutenants will receive an additional 24 hours of PTO which must be used by December 31, 2014.~~

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## Appendix F

### Program Guidelines for Issuance of Information Technology Equipment

The City of Pleasanton recognizes that department heads and middle managers are involved with projects that may create the need for work to be completed off-site and outside of normal working hours. To address this situation, the City may provide the information technology equipment needed to complete those projects. The technology will generally be provided through the use of notebook computers that are assigned to individual departments and/or through the assignment of information technology equipment that may be located in an individual's home. The uses of this equipment shall be consistent with this program.

#### **Notebook Computers**

As part of the City's information technology equipment inventory, notebook computers are assigned to individual departments. The number of notebooks available shall be determined as part of the annual budget review as approved by the City Manager. Departments are responsible for developing a sign-out procedure that assures the equipment is properly accounted for. Employees shall not install any application software or hardware in notebooks without prior approval of the [Director of Information Technology Manager](#). To assure proper operation of the equipment, any maintenance or/performance issues should be brought to the attention of the Information Technology Division as promptly as possible.

In addition to notebooks assigned to individual departments, upon recommendation of a City department head, the City Manager may approve the purchase of notebook computers to be assigned to individual employees. Use of these machines shall be consistent with the guidelines for stationary information technology equipment listed below.

#### **Stationary Information Technology Equipment**

City-provided information technology equipment for installation in an employee's home may include personal computers, printers, FAX machines, computer software and Internet access through the City's existing Internet equipment. The program does not include hardware upgrades to information technology equipment owned by department heads and/or middle managers. All equipment assigned under this program shall be purchased by the City and

shall be approved by the City Manager upon recommendation of the City department head. The City will not reimburse employees for purchases of information technology equipment.

All equipment provided by the City shall remain City property and must be returned upon request or upon an employee's termination of employment. The City will maintain equipment provided under this program, but employees are responsible for transporting equipment to and from City Hall for maintenance.

Equipment provided in accordance with the program is intended primarily for use on work-related assignments and its continued usage is subject to review and approval by the City Manager. However, occasional personal usage is permissible provided it conforms with City policy related to Internet access, e-mail and other information technology matters and provided it does not involve modifying City hardware or create maintenance demands. The City will not provide support for personal usage. The City does not assume liability for the effects of any employee-provided software installed on City-owned equipment.

## Appendix G Administration of the Bonus Program

### **Bonus Program Process**

The City Manager may award a bonus in recognition of a management or confidential employee's specific accomplishments demonstrating exceptional and significant leadership or management related to:

- Completing a significant community or organization project or program;
- Completing a major organizational change resulting in significant cost savings; or
- Completing a significant improvement to customer service benefiting the community or the organization.

To be granted a bonus, the employee's efforts must be beyond the high expectations of the management staff and be for a project or program that was substantially completed during the past year.

In September of each year, management and confidential employees will be given an opportunity to submit a *Bonus Consideration Form* to the City Manager detailing a specific work effort involving themselves or other employees to be considered for a bonus. The *Bonus Consideration Form* may be related to any work effort a confidential or management employee considers to be consistent with the guidelines as noted above. Notwithstanding the information submitted on the *Bonus Consideration Form*, the City Manager may independently consider specific work efforts.

The City Manager will review all bonus consideration forms and other specific work efforts and make a determination regarding those that meet the guidelines noted above. For projects or programs involving a work effort from a middle management or confidential employee, the City Manager may require a department head to review the *Bonus Consideration Form*.

The City Manager will determine the amount of a bonus granted to an employee and notify the employee of that determination. The City Manager will also notify each employee who submitted a *Bonus Consideration Form* of the outcome of the review. The City Manager may amend program guidelines as necessary on an annual basis.

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## Appendix H

### History of Management/Confidential Retiree Medical Benefits History

*(Note: See Section 5.2 (B) of this Plan for information on increases in premiums.)*

	HIRED PRIOR TO JANUARY 21, 2009		HIRED ON OR AFTER JANUARY 21, 2009																																																
CRITERIA	Retire on or after 9/1/96 but prior to 7/1/09	Retire on or after 7/1/09	New Vesting Schedule																																																
<b>ELIGIBILITY</b>	Retire from PERS at time of separation from City	Retire from PERS at time of separation from City	Retire from PERS at time of separation from City																																																
<b>PLAN DESIGN</b>	Tied to Kaiser 2-party early retiree plan - no changes to co-payments or plan design	Tied to 2-party rate of lowest cost HMO health plan with increased co-payments and plan design changes	Tied to single party rate of lowest cost HMO health plan with increased co-payments and plan design changes																																																
<b>PERCENTAGE ALLOTMENT<sup>6</sup></b>	<p>Service retirement: City pays 4% of the Kaiser 2-party rate for each year of service completed. Accelerates as follows: 10 yrs. = 75% 15 yrs. = 80% 20 yrs. = 90% 25 yrs. = 100%</p>	<p>Service retirement: City pays 4% of the lowest cost HMO 2-party rate for each year of service completed. Accelerates as follows: 10 yrs. = 75% 15 yrs. = 80% 20 yrs. = 90% 25 yrs. = 100%</p>	<p>Service retirement: City pays 4% of the lowest cost HMO single party rate for each year of service completed. Accelerates as follows: 10 yrs. = 75% 15 yrs. = 80% 20 yrs. = 90% 25 yrs. = 100%</p> <p>(*Employees hired on or after 1/1/2013 are <u>not</u> allowed an accelerated formula under PEPPRA)</p> <p>Per PEPPRA: a public employer shall <u>not</u> provide to managerial, elected or appointed officials a vesting schedule for postretirement health benefits that is more advantageous than that provided to other public employees, including represented employees, of the same public employer who are in related retirement membership classifications.</p>																																																
<b>CREDIT FOR YEARS OF SERVICE WITH PRIOR CALPERS MUNICIPAL AGENCIES</b>	Eligible to count prior years after five years of service with the City of Pleasanton	Eligible to count prior years after five years of service with the City of Pleasanton	None, if hired on or after January 1, 2009																																																
<b>MEDICARE ELIGIBILITY</b>	Retirees eligible for Parts A & B of Medicare must apply for benefits to remain on City group health plans. City is not obligated to contribute a monthly amount in excess of the monthly premium for Kaiser supplement to Medicare.	Retirees eligible for Parts A & B of Medicare must apply for benefits to remain on City group health plans. City is not obligated to contribute a monthly amount in excess of the monthly premium for lowest cost HMO plan supplement to Medicare.	None - retiree medical benefits terminate at age 65.																																																
<b>DISABILITY RETIREMENT</b>	<p>Years of service:</p> <table style="width: 100%; border: none;"> <tr> <td>10 = 20%</td> <td>18 = 54%</td> </tr> <tr> <td>11 = 25%</td> <td>19 = 57%</td> </tr> <tr> <td>12 = 30%</td> <td>20 = 80%</td> </tr> <tr> <td>13 = 35%</td> <td>21 = 84%</td> </tr> <tr> <td>14 = 40%</td> <td>22 = 88%</td> </tr> <tr> <td>15 = 45%</td> <td>23 = 92%</td> </tr> <tr> <td>16 = 48%</td> <td>24 = 96%</td> </tr> <tr> <td>17 = 51%</td> <td>25+ = 100%</td> </tr> </table> <p>Plan Designs remain the same as service retirement/Medicare</p>	10 = 20%	18 = 54%	11 = 25%	19 = 57%	12 = 30%	20 = 80%	13 = 35%	21 = 84%	14 = 40%	22 = 88%	15 = 45%	23 = 92%	16 = 48%	24 = 96%	17 = 51%	25+ = 100%	<p>Years of service:</p> <table style="width: 100%; border: none;"> <tr> <td>10 = 20%</td> <td>18 = 54%</td> </tr> <tr> <td>11 = 25%</td> <td>19 = 57%</td> </tr> <tr> <td>12 = 30%</td> <td>20 = 80%</td> </tr> <tr> <td>13 = 35%</td> <td>21 = 84%</td> </tr> <tr> <td>14 = 40%</td> <td>22 = 88%</td> </tr> <tr> <td>15 = 45%</td> <td>23 = 92%</td> </tr> <tr> <td>16 = 48%</td> <td>24 = 96%</td> </tr> <tr> <td>17 = 51%</td> <td>25+ = 100%</td> </tr> </table> <p>Plan Designs remain the same as service retirement/Medicare</p>	10 = 20%	18 = 54%	11 = 25%	19 = 57%	12 = 30%	20 = 80%	13 = 35%	21 = 84%	14 = 40%	22 = 88%	15 = 45%	23 = 92%	16 = 48%	24 = 96%	17 = 51%	25+ = 100%	<p>Years of service:</p> <table style="width: 100%; border: none;"> <tr> <td>10 = 20%</td> <td>18 = 54%</td> </tr> <tr> <td>11 = 25%</td> <td>19 = 57%</td> </tr> <tr> <td>12 = 30%</td> <td>20 = 80%</td> </tr> <tr> <td>13 = 35%</td> <td>21 = 84%</td> </tr> <tr> <td>14 = 40%</td> <td>22 = 88%</td> </tr> <tr> <td>15 = 45%</td> <td>23 = 92%</td> </tr> <tr> <td>16 = 48%</td> <td>24 = 96%</td> </tr> <tr> <td>17 = 51%</td> <td>25+ = 100%</td> </tr> </table> <p>Plan Designs remain the same as service retirement/Medicare</p>	10 = 20%	18 = 54%	11 = 25%	19 = 57%	12 = 30%	20 = 80%	13 = 35%	21 = 84%	14 = 40%	22 = 88%	15 = 45%	23 = 92%	16 = 48%	24 = 96%	17 = 51%	25+ = 100%
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<sup>6</sup> Percentages based on active employee's contributions for medical benefits.

Note: See Section 5.2 (B) of this Plan for information on increases in premiums

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