Attachment B
Strategic Support CSA and Appointees Metric Definitions

Table 1. CSA Workforce Indicators and Performance Measures

Outcome 1: Excellent City service delivery that enhances internal and external customer experience and engagement.

Workforce Indicators:
- **Community Resourcing Revenue and Spending.** Per capita community resourcing. *(Finance).*
- **Employee to Community Demographics.** City employee demographics compared to San José community. *(Human Resources).*
- **Bilingual-Certified City Employees compared to Community Demographics.** % of bilingual-certified City employees by language (oral and/or written) compared to community demographics. *(Human Resources).*

Performance Measures:
- **Information Technology Customer Satisfaction Rates.** % of Information Technology customers rating services as "Good" or "Excellent." *(Information Technology).*
- **Fleet and Equipment Services Customer Satisfaction Rates.** % of Public Works customers who rate Fleet and Equipment Services service good or better. *(Public Works).*
- **Facility Services Customer Satisfaction Rate.** % of Public Works customers who rate facility services as good or excellent. *(Public Works).*
- **Revenue Management Call Timeliness.** % of Revenue Management customer phone calls answered within 10 minutes. *(Finance).*
- **SJ311 Customer Satisfaction Score.** % of San José 311 customers who rate their experience as "very good" or "good." *(Information Technology).*
- **SJ311 Requests Meeting Time Targets.** % of San Jose 311 service requests that meet turnaround time targets. *(Information Technology).*
- **Projects with Baseline Budget.** % of Public Works projects completed within the approved baseline budget. *(Public Works).*
- **Projects within Baseline Schedule.** % of projects designed and constructed by Public Works within approved baseline schedule. *(Public Works).*
- **Average Days to Process Purchase Order.** Average number of days to process and execute a purchase order after receipt of department request. *(Finance).*
- **Labor Compliance Site Visits and Interviews.** % of reviewed Labor Compliance projects receiving at least two site visits and worker interviews by project completion. *(Public Works).*
- **Vendor Invoice Disbursements Paid.** % of vendor invoices disbursements paid within 7 days of receipt from City departments. *(Finance).*

Outcome 2: Strategic investments in people, technology, and assets.

Community Indicators:
- **Bond Rating.** City's General Obligation Bond rating: Moody's; Standard & Poor's; Fitch. *(Finance).*
- **City's Deferred Maintenance and Infrastructure Backlog.** $ of ongoing infrastructure backlog unfunded needs. *(Public Works).*
- **Fleet Vehicles Past Useful Life.** % of vehicles past useful life. *(Public Works).*

Performance Measures:
- **Uptime and Availability.** % of Information Technology and Public Works uptime and availability. *(Information Technology and Public Works).*
- **Facility Condition Rating.** % of facilities with a condition assessment rating of good or better. *(Public Works).*
- **Vehicle and Equipment Availability.** % of vehicles and equipment that are available for use when needed. *(Public Works).*
- **Minimum Wage Case Resolution.** % of minimum wage compliance cases resolved. *(Public Works).*
- **Contracts Rejected Under Wage Theft Policy.** % of contracts reviewed that are rejected due to wage theft policy noncompliance. *(Public Works).*
- **Cybersecurity Training Completion.** % of employees completing monthly cybersecurity training. *(Information Technology).*
- **Workers' Compensation Claims Contact Completed.** % of new workers' compensation claims that receive contact with employee, the City, and the treating physician within 3 working days. *(Human Resources).*
- **Finance Contract Insurance Clearance Issued.** % of Finance contracts processed for insurance clearance within 5 business days of receipt. *(Finance).*

Outcome 3: Inclusive, adaptive, and sustainable work environment.

Workforce Indicators:
- **Employee Retirement Eligibility.** % of employees that are eligible for retirement. *(Human Resources).*
- **Sales Tax Revenue.** San Jose Sales Tax revenue. *(Finance).*

Performance Measures:
- **Human Resources Training Usage.** % of employees who took a Human Resources-coordinated training in the last 12 months. *(Human Resources).*
- **Workers Compensation Claims Closure Rate.** % of workers' compensation claims closed. *(Human Resources).*
- **Citywide Staffing Rate.** % of positions filled as a total of budgeted positions. *(Human Resources).*
- **Employee Turnover Rate.** Employee Turnover Rate (excluding retirement). *(Human Resources).*
- **Employee Engagement by Generational Breakdown.** % of employees by generation. *(Human Resources).*

Table 2. Finance Department measures by core service

Core Service 1. Disbursements

Performance Measures:
- % of payroll payments made to employees accurately and timely on a biweekly basis.
- % of disbursements paid to vendors accurately and within 45 days.
- Average number of days from invoice date to check issuance based upon date of receipt by the Finance Department.

Activity and Workload Highlights:
- # of vendor invoices paid.
- # of payroll disbursements paid accurately and timely.
- # of payroll payments made.

Core Service 2. Financial Reporting

Performance Measures:
- Received Government Financial Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting award.
- Received unmodified audit opinion on the Annual Comprehensive Finance Report (ACFR).
- Submission of the bimonthly Financial Report (BFR) accurately and timely.

Activity and Workload Highlights:
- # of Bimonthly Financial Reports (MFR) Completed.

Core Service 3. Purchasing and Risk Management

Performance Measures:
- % of purchase orders to be processed and executed within 90 calendar days of receipt of department request.

Activity and Workload Highlights:
- $ of value procured through purchase orders.
- $ of cost savings achieved through the purchase order process.
- # of purchase orders (POs) processed and executed.
- # of contracts processed for insurance clearance.
- # of property loss prevention engineering visits.

Core Service 4. Revenue Management

Performance Measures:
- Return on Investment (ROI) for Revenue Management delinquent account collections.
- % of refunds processed within time targets.

Activity and Workload Highlights:
- Revenue Management Aging Receivable Balance for Current Receivables ($).
- Revenue Management Aging Receivable Balance for Delinquent Receivables ($).

Core Service 5. Debt and Treasury Management

Performance Measures:
- Average return on investments and Comparison Benchmarks.
- City's current credit rating for non-general obligation bond debt.

Activity and Workload Highlights:
- $ of debt portfolio managed.
- $ of the City's investment portfolio.
- Total volume and $ amount of revenue posted.

Table 3. Human Resources Department measures by core service

Core Service 1. Employee Benefits

Performance Measures:
- Cost of benefits administration per Full Time Equivalent (FTE) employee.
- % of employees contributing to Deferred Compensation.
- % of employees enrolled in the in-lieu of plan.
- % of employees utilizing annual Primary Care Provider (PCP) check-ups/well visits.
- Ratio of benefitted employees to benefits staff.

Activity and Workload Highlights:
- Annual $ contributions to Deferred Compensation.
- # of benefit enrollments and changes processed.
- Leave usage in hours.

Core Service 2. Employment Services

Performance Measures:
- % of City employee gender compared to community demographics.
- % of employees hired that are (Internal hires; External hires).
- % of City's hiring goals that are met.

Activity and Workload Highlights:
- # of positions filled.
- # of hired employees that are external versus internal.

Core Service 3. Health and Safety

Performance Measures:
- Expenditure for Workers' Compensation per $100 of total City salaries, benefits, and retirement.
- % of unduplicated employees trained in safety.
- Rate of injuries and illnesses per 100 full-time workers (Total Recordable Incident Rate).

Activity and Workload Highlights:
- # of total Workers' Compensation claims status.
- # of Workers' Compensation disability hours.

Core Service 4. Training and Development

Performance Measures:
- % employees rating the effectiveness of training classes as "good" to "excellent."
- % attendees who say that the training class met their objectives.
- Annual Human Resources training investment per employee.

Activity and Workload Highlights:
- # of unique training courses offered, hours provided, registrations processed, and attendees.
- # of career-related outreach events.
- # of employees engaging in Citywide Mentorship Program.

Table 4. Information Technology Department measures by core service

Core Service 1. Business Solutions

Performance Measures:
- % of project management office project success rate based on scope, timeliness, and budget.
- % of Microsoft security standards met for applications, data, devices, and identity (Microsoft Secure Score).
- % of Payroll Cycles completed in three days.

Activity and Workload Highlights:
- # of business systems managed.
- # of successful financial cycles closed on systems.
- # of successful payroll cycles processed on systems.

- # of successful pay, benefits, tax, and union agreement changes implemented prior to Finance/Human Resources/Employee Relations deadlines.
- # of live technology deployments.

Core Service 2. San José 311

Performance Measures:
- % of Customer Contact Center contacts answered.
- % of San José 311 phone contacts resolved at first call.
- % of San José 311 customers rating representative contact as professional, courteous, and knowledgeable.
- Average caller wait time.
- Average call duration.

Activity and Workload Highlights:
- # of Customer Contact Center Contacts.
- # of active SJ311 application and website users.
- # of total SJ311 requests.
- # of hang ups/lost calls.

Core Service 3. Technology Infrastructure and Operations

Performance Measures:
- % of overall Technology Help Desk ticket volume resolved.
- % of Technology Help Desk tickets resolved within 2 business days.
- Average length of unplanned network outages.
- % of employees that have taken a privacy, data upscaling, or AI training in the last 12 months.

Activity and Workload Highlights:
- # of unplanned network outages.
- # of Severity 1 infrastructure service outages.
- # of Technology Help Desk tickets.

Table 5. Public Works Department measures by core service

Core Service 1. Facilities Management

Performance Measures:
- % of City-owned buildings that are in full compliance with the Building Performance Ordinance (energy and water usage) including beyond benchmark requirement.
- % of preventative maintenance work orders completed.
- % of non-health and safety work completed within time standards.

Activity and Workload Highlights:
- # of corrective and preventative work orders completed.

- # of square footage maintained.

Core Service 2. Fleet and Equipment Services

Performance Measures:
- % of fleet in compliance with replacement cycle.
- % of fleet that is alternate fuel vehicles.
- $ per mile or hours, by equipment class and fuel type.
- Average vehicle downtime that is out of service due to service or repair.

Activity and Workload Highlights:
- # of repair and preventative work orders.
- # of vehicles and equipment.
- # of City-operated charging stations.
- # of new vehicles delivered.

Core Service 3. Plan, Design, and Construct Public Facilities and Infrastructure

Performance Measures:
- Departmental project delivery costs compared to target industry norm.

Activity and Workload Highlights:
- # of construction projects delivered.
- $ of project construction costs.

Core Service 4. Strategic Support

Performance Measures:
- % of projects that have labor compliance issues.
- Average City-staff Geographic Information System (GIS) web requests served per month.
- Average monthly usage of public-facing Geographic Information System (GIS) web services and applications.
- Average time of compliance (restitution paid to workers).

Activity and Workload Highlights:
- # of contracts reviewed for Public Works construction vs. Service and Maintenance.
- # of contracts with labor compliance violations identified (# of contractors; # of violations leading to a fine; # of workers with restitutions paid; # minimum wage; # prevailing wage; # of living wage).
- # of minimum wage compliance cases.
- # of contractors' employees and workers owed restitution.

Table 6. Office of the City Attorney measures by core service

Appointee: Office of the City Attorney

Performance Measures:
- % of time final case results are within staff analyses and/or recommendations.
- Cost of representation and advice and documentation compared to law offices of similar size, practice, and expertise, including other governmental law offices.
- % of survey respondents rating legal services satisfactory or better based on quality, cycle time, and professionalism.

Activity and Workload Highlights:
- # of claims and lawsuits filed.
- # of Council/Board/Manager memoranda prepared and reviewed.
- # of documents reviewed.

Table 7. Office of the City Auditor measures by core service

Appointee: Office of the City Auditor

Performance Measures:
- % of audit recommendations implemented (cumulative over 10 years).
- Ratio estimated monetary benefit to audit cost (cumulative over 3 years).
- % of proposed workplan completed or substantially completed during the fiscal year.

Activity and Workload Highlights:
- # of reports issued.
- # of reports per auditor.
- $ of estimated monetary benefits.

Table 8. Office of the City Clerk measures by core service

Appointee: Office of the City Clerk

Performance Measures:
- % of Public Records Act requests received and fulfilled by the Clerk's Office within 10 days of Request.
- % of Resolutions/Ordinances posted online within 3 business days of receipt from the City Attorney's Office.
- % of Council draft minutes completed and posted online within 3 business days after the Council meeting.
- Estimated cost to document and track legislative actions per Council meeting.

- % of customers rating customer service experience with the Clerk's Office as "good" or "excellent."

Activity and Workload Highlights:
- # of meetings staffed.
- # of Council Actions recorded, processed, and tracked; # of Ordinances and Resolutions processed; and # of Brown Act agendas posted online.
- # of grants processed (Council Office and Arena Community Fund); # of Onboarded Council staff (employees and volunteers).
- # of Public Records Act requests processed; # of documents supplied.
- # of elections conducted.

Table 9. Office of the City Manager measures by core service

Appointee: Office of the City Manager

Performance Measures:
- % of the public having contact with City employees who are satisfied or very satisfied with the: timeliness of City employees; courtesy of City employees; competency of City employees).
- % of CSA and Core Services performance measures meeting or exceeding their performance targets levels established by the City Council.
- % of residents who are "satisfied" or "very satisfied" with the City's quality of services.
- Digital Communication Scores: City Website Accessibility Score (Automated Testing); City Website Reading Level Score.
- % of residents who say they trust the City of San Jose.
- General Purpose Reserves as a % of General Fund operating expenditures (CC Policy 1-18).
- % of City Council Referrals completed.
- % of Leadership and Supervision Academy participants who rate the Academy's core courses as "good" or "excellent."
- % of City employees that understand how racial equity, inclusion, disability access, accessibility, and intersectionality relate to their role (4 or better on a 5-point scale).

Activity and Workload Highlights:
- # of investigations conducted by the Office of Employee Relations; # of formal disciplines processed; # of Meet and Confer Issues (labor negotiations).
- # of City Council agenda reports; # of contracts/agreements approved; # of public record act requests processed by the City Manager's Office.
- $ budgeted towards operating and capital service delivery.

- # of social media and website interactions; # of e-notifications emails opened (news releases, flash reports, city news, etc.); # of language access vendor requests made by departments from Citywide Open Purchase Orders.
- # of employees who take Citywide trainings.

Table 10. Office of Retirement Services measures by core service

Appointee: Office of Retirement Services

Performance Measures:
- Actuarial Funded Status: Federated Pension Plan; Police and Fire Pension Plan.
- Trailing 10-year history of annual performance vs. discount rate.
- Ratio of active (working) members to retired members.

Activity and Workload Highlights:
- # of employees retired by pension plan type: Tier 1; Tier 2; Tier 2B.
- # of customer interactions received by type: Main customer service desk via calls; Email; Walk-in.
- Total $ amount in each plan type: Pensions (Federated; Police and Fire); Healthcare (Federated; Police and Fire).
- # of pension benefit applications processed.