

**TWAIN HARTE COMMUNITY SERVICES DISTRICT  
Finance/Policy Committee Meeting**

**Chair:** *Eileen Mannix*  
**Co-Chair:** *Mary Dearborn*

**THCS D CONFERENCE ROOM  
22912 VANTAGE POINTE DR., TWAIN HARTE  
June 4, 2025 1:30 p.m.**

**NOTICE: Public May Attend this Meeting In-Person.**

The meeting will be accessible via ZOOM for anyone that chooses to participate virtually:

- Videoconference Link: <https://us02web.zoom.us/j/81786535555>
  - Meeting ID: 817 8653 5555
  - Telephone: (669) 900-6833
- ❖ Teleconference Location (Director Dearborn):  
18175 Lakeview Drive, Twain Harte, CA. 95383

**AGENDA**

- 1. Review historical strike team revenue and discuss opportunities created through potential inclusion of revenue in annual budget.**
- 2. Review Organization Chart and FY 2025-26 Salary Plan.**
- 3. Review/discuss final draft Fiscal Year 2025-26 Administration Fund Budget and overall Budget.**
- 4. Review estimated Reserves Summary.**
- 5. Discuss AB 2561 requirements regarding notification of vacancies.**
- 6. Adjourn.**

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**HOW TO VIRTUALLY PARTICIPATE IN THIS MEETING**

The public can virtually observe and participate in a meeting as follows:

- **Computer:** Join the videoconference by clicking the videoconference link located at the top of this agenda or on our website. You may be prompted to enter your name and email. Your email will remain private and you may enter "anonymous" for your name.

- **Smart Phone/Tablet:** Join the videoconference by clicking the videoconference link located at the top of this agenda OR log in through the Zoom mobile app and enter the Meeting ID# and Password found at the top of this agenda. You may be prompted to enter your name and email. Your email will remain private and you may enter “anonymous” for your name.
- **Telephone:** Listen to the meeting by calling Zoom at (4669) 900-6833. Enter the Meeting ID# listed at the top of this agenda, followed by the pound (#) key.

\* NOTE: your personal video will be disabled and your microphone will be automatically muted.

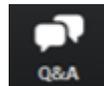
### **SUBMITTING PUBLIC COMMENT**

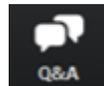
The public will have an opportunity to comment before and during the meeting as follows:

- **Before the Meeting:**
  - Email comments to [ksilva@twainhartecsd.com](mailto:ksilva@twainhartecsd.com), write “Public Comment” in the subject line. In the body of the email, include the agenda item number and title, as well as your comments.
  - Mail comments to THCSD Board Secretary: P.O. Box 649, Twain Harte, CA 95383
- **During the Meeting:**
  - Computer/Tablet/Smartphone: Click the “Raise Hand” icon and the host will unmute your audio when it is time to receive public comment. If you would rather make a comment in writing, you may click on the “Q&A” icon and type your comment. You may need to tap your screen or click on “View Participants” to make icons visible.



Raise Hand Icon:  Raise Hand



Q&A Icon:  Q&A

- Telephone: Press \*9 if to notify the host that you have a comment. The host will unmute you during the public comment period and invite you to share comments.
- In-Person: Raise your hand and the Board Chairperson will call on you.

\* NOTE: If you wish to speak on an item on the agenda, you are welcome to do so during consideration of the agenda item itself. If you wish to speak on a matter that does not appear on the agenda, you may do so during the Public Comment period. Persons speaking during the Public Comment will be limited to five minutes or depending on the number of persons wishing to speak, it may be reduced to allow all members of the public the opportunity to address the Board. Except as otherwise provided by law, no action or discussion shall be taken/conducted on any item not appearing on the agenda. Public comments must be addressed to the board as a whole through the President. Comments to individuals or staff are not permitted.

### **MEETING ETIQUETTE**

Attendees shall make every effort not to disrupt the meeting. Cell phones must be silenced or set in a mode that will not disturb District business during the meeting.

### **ACCESSIBILITY**

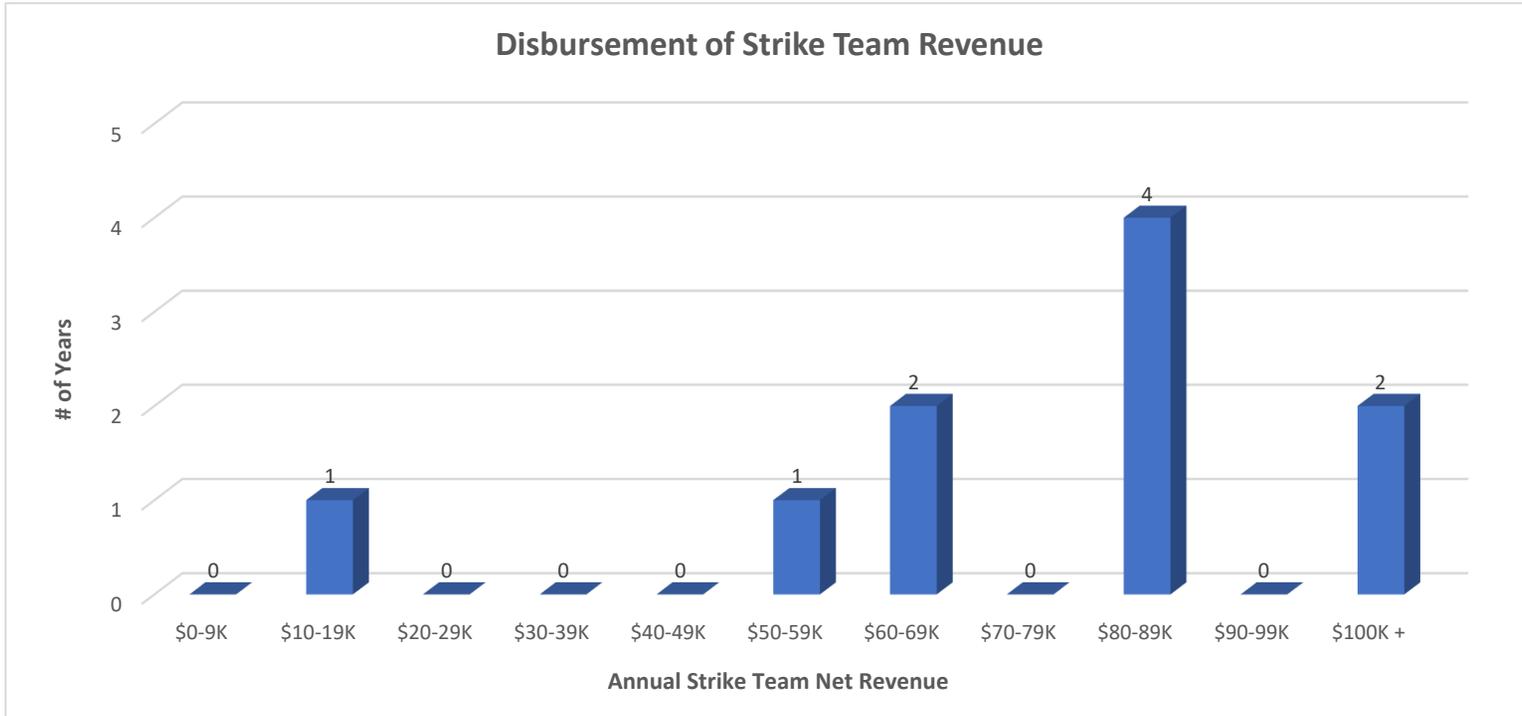
Board meetings are accessible to people with disabilities. In compliance with the Americans with Disabilities Act, those requiring accommodations for this meeting should notify the District office 48 hours prior to the meeting at (209) 586-3172.

### **WRITTEN MEETING MATERIALS**

If written materials relating to items on this Agenda are distributed to Board members prior to the meeting, such materials will be made available for public inspection on the District's website:  
[www.twainhartecsd.com](http://www.twainhartecsd.com)

### 10-Year Strike Team Analysis

	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	AVERAGE
Revenue	\$ 189,795	\$ 139,561	\$ 230,524	\$ 276,820	\$ 85,792	\$ 177,651	\$ 180,492	\$ 154,051	\$ 326,803	\$ 655,233	\$ 241,672
Estimated Salary Expense	\$ 126,174	\$ 71,835	\$ 147,614	\$ 188,717	\$ 74,467	\$ 127,143	\$ 97,123	\$ 69,547	\$ 159,576	\$ 349,186	\$ 141,138
<b>Surplus/(Loss)</b>	<b>\$ 63,621</b>	<b>\$ 67,726</b>	<b>\$ 82,910</b>	<b>\$ 88,103</b>	<b>\$ 11,325</b>	<b>\$ 50,508</b>	<b>\$ 83,369</b>	<b>\$ 84,504</b>	<b>\$ 167,227</b>	<b>\$ 306,047</b>	<b>\$ 100,534</b>



# THCSD FIRE STAFFING RESTRUCTURE ANALYSIS

## LEGEND

<b>Position</b>	Full-time paid position
<b>Position</b>	Volunteer intern position (when filled)

## CURRENT FIRE STAFFING

A SHIFT	B SHIFT	C SHIFT
<b>Captain</b>	<b>Captain</b>	<b>Captain</b>
<b>Operator Intern</b>	<b>Operator Intern</b>	<b>Operator Intern</b>
<b>FF Intern</b>	<b>FF Intern</b>	<b>FF Intern</b>
<b>FF Intern</b>	<b>FF Intern</b>	<b>FF Intern</b>

## PROPOSED FIRE STAFFING

A SHIFT	B SHIFT	C SHIFT
<b>Captain</b>	<b>Engineer</b>	<b>Captain</b>
<b>Engineer</b>	<b>Operator Intern</b>	<b>Engineer</b>
<b>FF Intern</b>	<b>FF Intern</b>	<b>FF Intern</b>
	<b>FF Intern</b>	

## PROS

- Two additional full-time staffing
- Better trained and experienced shifts = better service and consistency
- Guaranteed two drivers for each shift
- More personnel redundancy - less overtime costs
- Better recruitment/retention - career opportunities for interns & engineers
- Not as reliant on intern availability
- Less Mandatory Overtime
- Makes reaching goal of 2 full-time staff on each shift more attainable

## CONS

- Costs approximately \$76,000 to \$80,000 more per year
- Two shifts have 3 instead of 4 on them (when enough volunteer interns interested/available)
- One shift requires more Chief oversight due to lack of Captain position



Twain Harte Community Services District  
FIRE - 3 Captains (48/96)  
FIVE YEAR PROJECTIONS

	23/24	24/25	25/26	26/27	27/28	28/29	29/30
	Actuals	Budget	Projections	Projections	Projections	Projections	Projections
<b>Revenue</b>							
Service Charges	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Fees	-	-	-	-	-	-	-
Taxes & Assessments	1,341,543	1,387,200	1,414,000	1,451,590	1,490,308	1,530,187	1,571,263
Grants & Donations	85,433	181,505	129,804	-	-	-	-
Other Operating Revenue	445,982	491,200	86,400	50,000	50,000	50,000	50,000
<b>Total Program Revenue</b>	<b>\$ 1,872,958</b>	<b>\$ 2,059,905</b>	<b>\$ 1,630,204</b>	<b>\$ 1,501,590</b>	<b>\$ 1,540,308</b>	<b>\$ 1,580,187</b>	<b>\$ 1,621,263</b>
Administrative Cost Allocation	204	180	180	180	180	180	-
<b>GRAND TOTAL REVENUE</b>	<b>\$ 1,873,162</b>	<b>\$ 2,060,085</b>	<b>\$ 1,630,384</b>	<b>\$ 1,501,770</b>	<b>\$ 1,540,488</b>	<b>\$ 1,580,367</b>	<b>\$ 1,621,263</b>
<b>Expenses</b>							
Salaries	\$ 734,074	\$ 869,431	646,738	662,184	679,143	688,006	\$ 698,445
Benefits	341,609	402,229	347,081	361,853	359,827	377,593	389,593
Equip, Auto, Maint, & Repairs	156,844	216,000	105,900	96,717	99,619	102,608	105,686
Materials & Supplies	12,176	9,900	13,200	11,536	11,882	12,238	12,605
Outside Services	23,851	29,700	26,300	26,059	26,841	27,646	28,475
Other	102,272	122,900	146,400	112,682	116,062	119,544	123,130
Debt Service	-	-	-	-	-	-	-
<b>Total Program Expenses</b>	<b>\$ 1,370,826</b>	<b>\$ 1,650,160</b>	<b>\$ 1,285,619</b>	<b>\$ 1,271,031</b>	<b>\$ 1,293,374</b>	<b>\$ 1,327,635</b>	<b>\$ 1,357,933</b>
Administrative Cost Allocation	131,488	151,471	156,419	161,064	167,446	175,560	182,052
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 1,502,314</b>	<b>\$ 1,801,631</b>	<b>\$ 1,442,038</b>	<b>\$ 1,432,095</b>	<b>\$ 1,460,820</b>	<b>\$ 1,503,195</b>	<b>\$ 1,539,985</b>
<b>TOTAL OPERATING BALANCE</b>	<b>\$ 370,848</b>	<b>\$ 258,454</b>	<b>\$ 188,346</b>	<b>\$ 69,675</b>	<b>\$ 79,667</b>	<b>\$ 77,172</b>	<b>\$ 81,277</b>
<b>Capital Expenses</b>							
Capital Outlay	181,382	229,297	296,000	50,000	80,000	-	-
<b>TOTAL CAPITAL EXPENSES</b>	<b>181,382</b>	<b>229,297</b>	<b>296,000</b>	<b>50,000</b>	<b>80,000</b>	<b>-</b>	<b>-</b>
<b>GRAND TOTAL EXPENSES</b>	<b>\$ 1,683,696</b>	<b>\$ 2,030,928</b>	<b>\$ 1,738,038</b>	<b>\$ 1,482,095</b>	<b>\$ 1,540,820</b>	<b>\$ 1,503,195</b>	<b>\$ 1,539,985</b>
<b>TRANSFER TO/(FROM) RESERVE</b>	<b>\$ 189,466</b>	<b>\$ 29,157</b>	<b>\$ (107,654)</b>	<b>\$ 19,675</b>	<b>\$ (333)</b>	<b>\$ 77,172</b>	<b>\$ 81,277</b>
<b>Capital Reserve Balance</b>	<b>\$ 687,136</b>	<b>\$ 532,279</b>	<b>\$ 603,184</b>	<b>\$ 626,096</b>	<b>\$ 609,611</b>	<b>\$ 663,753</b>	<b>\$ 724,737</b>
<b>Rate/Revenue Stabilization Reserve</b>	<b>\$ 66,651</b>	<b>\$ 64,089</b>	<b>\$ 65,327</b>	<b>\$ 67,063</b>	<b>\$ 68,852</b>	<b>\$ 70,695</b>	<b>\$ 72,592</b>
<b>Operating Reserve Balance</b>	<b>\$ 714,240</b>	<b>\$ 900,816</b>	<b>\$ 721,019</b>	<b>\$ 716,047</b>	<b>\$ 730,410</b>	<b>\$ 751,597</b>	<b>\$ 769,993</b>
<b>GRAND TOTAL RESERVES</b>	<b>\$ 1,468,027</b>	<b>\$ 1,497,184</b>	<b>\$ 1,389,530</b>	<b>\$ 1,409,206</b>	<b>\$ 1,408,873</b>	<b>\$ 1,486,045</b>	<b>\$ 1,567,322</b>

**NOTES/ASSUMPTIONS**

- 1) Assessments are assumed to increase by 3% each year.
- 2) Tax revenue assumed to increase by 3% per year, which is the average over last 10 years.
- 3) Other revenue (interest, Strawberry admin services) predicted not to increase to create a conservative projection.
- 4) Salaries and benefits based on actual projections with approved COLA's, step increases, and adopted PERS rates for existing personnel.
- 5) Benefits include a projection of Workers Comp as if no more significant injuries occur - EMOD is high through FY 26-27, then drops.
- 6) Expenses are assumed to increase by 3% per year, except that major one-time projects planned for FY 25-26 are removed from FY 26-27.
- 7) Administrative costs are based on 5-Year Admin Fund projections.
- 8) Capital Outlay is based on 5-year CIP plans.
- 9) Capital Outlay for FY 24-25 is projected, not budgeted (see CIP Plan)
- 10) FY 24-25 Grant Revenue and Other Revenue is projected, not budgeted.

Twain Harte Community Services District  
 FIRE - 2 CAPTAINS (48/96) + 3 ENGINEERS (48/96)  
 FIVE YEAR PROJECTIONS

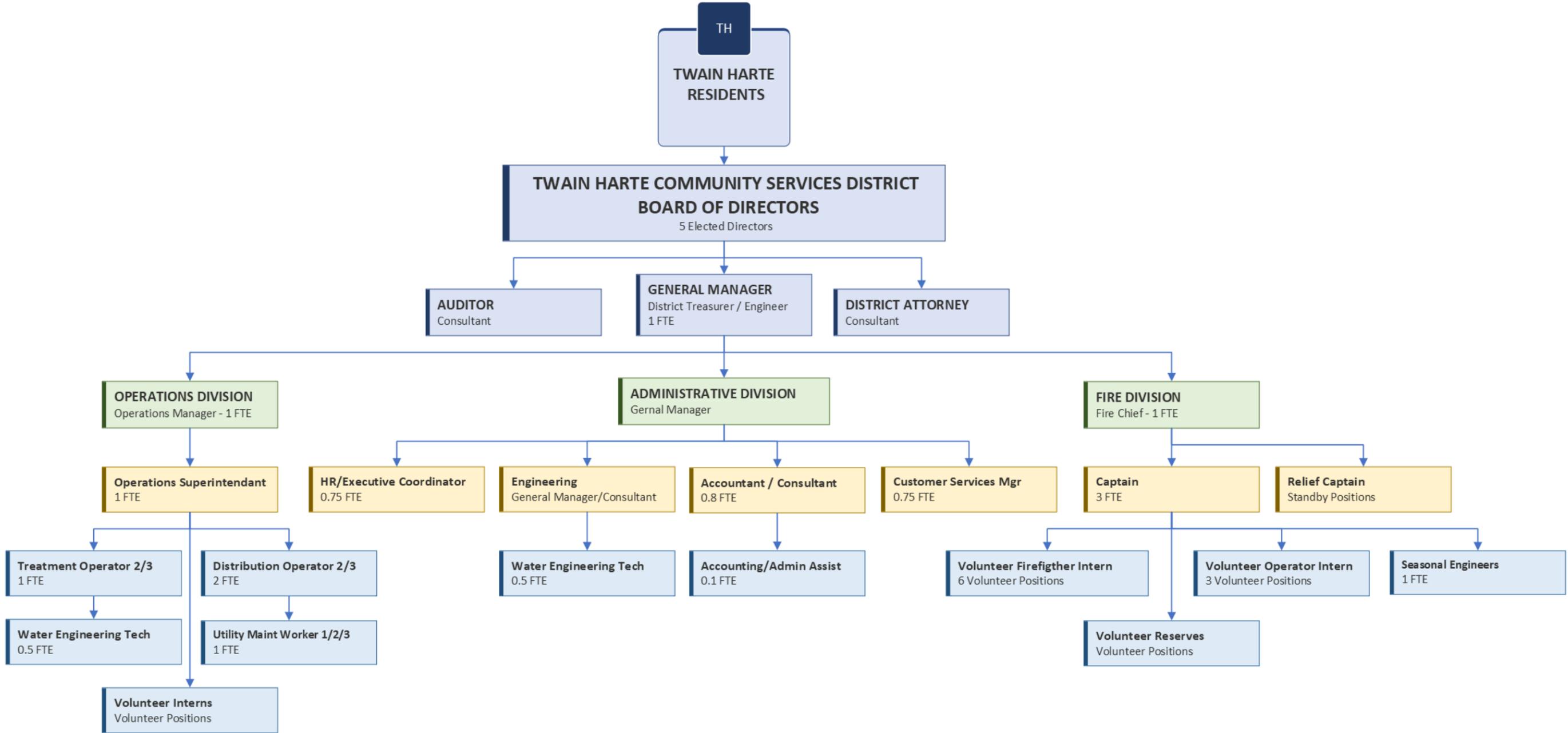
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	Actuals	Budget	Projections	Projections	Projections	Projections	Projections
<b>Revenue</b>							
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Fees	-	-	-	-	-	-	-
Taxes & Assessments	1,341,543	1,387,200	1,414,000	1,451,590	1,490,308	1,530,187	1,571,263
Grants & Donations	85,433	181,505	-	-	-	-	-
Other Operating Revenue	445,982	491,200	86,400	50,000	50,000	50,000	50,000
<b>Total Program Revenue</b>	<b>\$ 1,872,958</b>	<b>\$ 2,059,905</b>	<b>\$ 1,500,400</b>	<b>\$ 1,501,590</b>	<b>\$ 1,540,308</b>	<b>\$ 1,580,187</b>	<b>\$ 1,621,263</b>
Administrative Cost Allocation	204	180	180	180	180	180	-
<b>GRAND TOTAL REVENUE</b>	<b>\$ 1,873,162</b>	<b>\$ 2,060,085</b>	<b>\$ 1,500,580</b>	<b>\$ 1,501,770</b>	<b>\$ 1,540,488</b>	<b>\$ 1,580,367</b>	<b>\$ 1,621,263</b>
<b>Expenses</b>							
Salaries	\$ 734,074	\$ 869,431	655,797	669,083	683,475	690,406	\$ 704,017
Benefits	341,609	402,229	414,329	432,902	432,315	451,756	466,640
Equip, Auto, Maint, & Repairs	156,844	216,000	105,900	96,717	99,619	102,608	105,686
Materials & Supplies	12,176	9,900	13,200	11,536	11,882	12,238	12,605
Outside Services	23,851	29,700	26,300	26,059	26,841	27,646	28,475
Other	102,272	122,900	146,400	112,682	116,062	119,544	123,130
Debt Service	-	-	-	-	-	-	-
<b>Total Program Expenses</b>	<b>\$ 1,370,826</b>	<b>\$ 1,650,160</b>	<b>\$ 1,361,926</b>	<b>\$ 1,348,980</b>	<b>\$ 1,370,194</b>	<b>\$ 1,404,198</b>	<b>\$ 1,440,552</b>
Administrative Cost Allocation	131,488	151,471	156,419	161,064	167,446	175,560	182,052
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 1,502,314</b>	<b>\$ 1,801,631</b>	<b>\$ 1,518,345</b>	<b>\$ 1,510,044</b>	<b>\$ 1,537,640</b>	<b>\$ 1,579,758</b>	<b>\$ 1,622,604</b>
<b>TOTAL OPERATING BALANCE</b>	<b>\$ 370,848</b>	<b>\$ 258,454</b>	<b>\$ (17,765)</b>	<b>\$ (8,274)</b>	<b>\$ 2,848</b>	<b>\$ 609</b>	<b>\$ (1,342)</b>
<b>Capital Expenses</b>							
Capital Outlay	181,382	229,297	166,196	50,000	80,000	-	-
<b>TOTAL CAPITAL EXPENSES</b>	<b>181,382</b>	<b>229,297</b>	<b>166,196</b>	<b>50,000</b>	<b>80,000</b>	<b>-</b>	<b>-</b>
<b>GRAND TOTAL EXPENSES</b>	<b>\$ 1,683,696</b>	<b>\$ 2,030,928</b>	<b>\$ 1,684,541</b>	<b>\$ 1,560,044</b>	<b>\$ 1,617,640</b>	<b>\$ 1,579,758</b>	<b>\$ 1,622,604</b>
<b>TRANSFER TO/(FROM) RESERVE</b>	<b>\$ 189,466</b>	<b>\$ 29,157</b>	<b>\$ (183,961)</b>	<b>\$ (58,274)</b>	<b>\$ (77,152)</b>	<b>\$ 609</b>	<b>\$ (1,342)</b>
<b>Capital Reserve Balance</b>	<b>\$ 687,136</b>	<b>\$ 532,279</b>	<b>\$ 488,724</b>	<b>\$ 432,865</b>	<b>\$ 340,126</b>	<b>\$ 317,833</b>	<b>\$ 293,171</b>
<b>Rate/Revenue Stabilization Reserve</b>	<b>\$ 66,651</b>	<b>\$ 64,089</b>	<b>\$ 65,327</b>	<b>\$ 67,063</b>	<b>\$ 68,852</b>	<b>\$ 70,695</b>	<b>\$ 72,592</b>
<b>Operating Reserve Balance</b>	<b>\$ 714,240</b>	<b>\$ 900,816</b>	<b>\$ 759,172</b>	<b>\$ 755,022</b>	<b>\$ 768,820</b>	<b>\$ 789,879</b>	<b>\$ 811,302</b>
<b>GRAND TOTAL RESERVES</b>	<b>\$ 1,468,027</b>	<b>\$ 1,497,184</b>	<b>\$ 1,313,223</b>	<b>\$ 1,254,950</b>	<b>\$ 1,177,798</b>	<b>\$ 1,178,407</b>	<b>\$ 1,177,065</b>

**NOTES/ASSUMPTIONS**

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- 4) Salaries and benefits based on actual projections with approved COLA's, step increases, and adopted PERS rates for existing personnel.
- 5) Benefits include a projection of Workers Comp as if no more significant injuries occur - EMOD is high through FY 26-27, then drops.
- 6) Expenses are assumed to increase by 3% per year, except that major one-time projects planned for FY 25-26 are removed from FY 26-27.
- 7) Administrative costs are based on 5-Year Admin Fund projections.
- 8) Capital Outlay is based on 5-year CIP plans.
- 9) Capital Outlay for FY 24-25 is projected, not budgeted (see CIP Plan)
- 10) FY 24-25 Grant Revenue and Other Revenue is projected, not budgeted.

**TWAIN HARTE COMMUNITY SERVICES DISTRICT  
ORGANIZATION CHART**

Total Staff - 15.4 FTE



**TWAIN HARTE COMMUNITY SERVICES DISTRICT**  
**FISCAL YEAR 2025/26 HOURLY SALARY SCHEDULE - Effective July 1, 2025**

TITLE	Competence Salary Steps					Expertise Salary Steps**				
	1	2	3	4	5	6	7	8	9	
<b>UNION POSITIONS</b>										
Accounting/Administrative Assistant*	\$ 25.604	\$ 26.885	\$ 28.229	\$ 29.640	\$ 31.122	\$ 32.678	\$ 34.312	\$ 36.028	\$ 37.829	
Customer Services Manager*	\$ 34.110	\$ 35.815	\$ 37.606	\$ 39.486	\$ 41.460	\$ 43.533	\$ 45.710	\$ 47.996	\$ 50.395	
Customer Services Representative*	\$ 28.184	\$ 29.593	\$ 31.072	\$ 32.626	\$ 34.257	\$ 35.970	\$ 37.769	\$ 39.657	\$ 41.640	
Fire Captain^	\$ 26.260	\$ 27.573	\$ 28.952	\$ 30.399	\$ 31.919	\$ 33.515	\$ 35.191	\$ 36.950	\$ 38.798	
Seasonal Fire Engineer	\$ 17.000									
Fire Relief Captain^	\$ 20.028									
Water Engineering Tech*	\$ 32.691	\$ 34.326	\$ 36.042	\$ 37.844	\$ 39.736	\$ 41.723	\$ 43.809	\$ 46.000	\$ 48.299	
Utility Maintenance Worker I*	\$ 22.062	\$ 23.165	\$ 24.324	\$ 25.540	\$ 26.817	\$ 28.158	\$ 29.565	\$ 31.044	\$ 32.596	
Utility Maintenance Worker II*	\$ 23.607	\$ 24.787	\$ 26.027	\$ 27.328	\$ 28.694	\$ 30.129	\$ 31.636	\$ 33.217	\$ 34.878	
Utility Maintenance Worker III*	\$ 25.259	\$ 26.522	\$ 27.849	\$ 29.241	\$ 30.703	\$ 32.238	\$ 33.850	\$ 35.543	\$ 37.320	
Distribution Operator II*	\$ 29.206	\$ 30.666	\$ 32.199	\$ 33.809	\$ 35.500	\$ 37.275	\$ 39.138	\$ 41.095	\$ 43.150	
Distribution Operator III*	\$ 33.303	\$ 34.968	\$ 36.717	\$ 38.552	\$ 40.480	\$ 42.504	\$ 44.629	\$ 46.861	\$ 49.204	
Treatment Operator II*	\$ 30.855	\$ 32.398	\$ 34.018	\$ 35.719	\$ 37.504	\$ 39.380	\$ 41.349	\$ 43.416	\$ 45.587	
Treatment Operator III*	\$ 34.170	\$ 35.879	\$ 37.672	\$ 39.556	\$ 41.534	\$ 43.611	\$ 45.791	\$ 48.081	\$ 50.485	
Operations Superintendent*	\$ 40.392	\$ 42.412	\$ 44.532	\$ 46.759	\$ 49.097	\$ 51.552	\$ 54.129	\$ 56.836	\$ 59.677	
<b>MANAGEMENT POSITIONS (Exempt)</b>										
HR/Executive Coordinator*	\$ 35.133	\$ 36.890	\$ 38.734	\$ 40.671	\$ 42.705	\$ 44.840	\$ 47.082	\$ 49.436	\$ 51.908	
Finance Officer*	\$ 53.616	\$ 56.297	\$ 59.112	\$ 62.068	\$ 65.171	\$ 68.430	\$ 71.851	\$ 75.444	\$ 79.216	
Accountant (Confidential)*	\$ 40.953	\$ 43.001	\$ 45.151	\$ 47.408	\$ 49.779	\$ 52.268	\$ 54.881	\$ 57.625	\$ 60.506	
Fire Chief~^	\$ 53.175	\$ 55.834	\$ 58.625	\$ 61.556	\$ 64.634	\$ 67.866	\$ 71.259	\$ 74.822	\$ 78.563	
Operations Manager/Assistant General Manager*	\$ 54.603	\$ 57.333	\$ 60.200	\$ 63.210	\$ 66.370	\$ 69.688	\$ 73.173	\$ 76.832	\$ 80.673	
General Manager (By Contract)				2025/26 Negotiated Contract Amount: \$90.616/hour						

**Notes**

- \* 2% Union Negotiated COLA Increase Effective July 1, 2025
- ^ 2% Union Negotiated COLA Increase Effective July 1, 2025
- \*\* Succession to the next step requires a minimum of five years at the previous step.

Adopted - June 11, 2025

Twain Harte Community Services District  
2025-2026 Budget

	WATER			SEWER			FIRE			PARK			ADMIN			TOTAL
	FY 24/25	Proposed	% Diff	FY 24/25	Proposed	% Diff	FY 24/25	Proposed	% Diff	FY 24/25	Proposed	% Diff	FY 24/25	Proposed	% Diff	PROJECTED
<b>Revenue</b>																
Service Charges	\$ 1,634,400	\$ 1,691,600	3%	\$ 1,353,900	\$ 1,447,000	7%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ 3,138,600
Fees	20,100	21,100	5%	15,600	16,100	3%	-	-	0%	12,000	13,000	8%	-	-	0%	50,200
Taxes & Assessments	43,400	44,300	2%	-	-	0%	1,387,200	1,414,000	2%	157,700	162,400	3%	-	-	0%	1,620,700
Grants & Donations	22,000	130,000	491%	4,500	-	-100%	311,505	129,804	-58%	571,700	93,200	-84%	-	-	0%	353,004
Other Revenue	63,300	75,500	19%	32,000	40,000	25%	491,200	86,400	-82%	-	5,000	5000%	1,000	1,000	0%	207,900
<b>Total Program Revenue</b>	<b>\$ 1,783,200</b>	<b>\$ 1,962,500</b>	<b>10%</b>	<b>\$ 1,406,000</b>	<b>\$ 1,503,100</b>	<b>7%</b>	<b>\$ 2,189,905</b>	<b>\$ 1,630,204</b>	<b>-26%</b>	<b>\$ 741,400</b>	<b>\$ 273,600</b>	<b>-63%</b>	<b>\$ 1,000</b>	<b>\$ 1,000</b>	<b>0%</b>	<b>\$ 5,370,404</b>
Admin Revenue Allocation	470	470	0%	250	250	0%	180	180	0%	100	100	0%	(1,000)	(1,000)	0%	-
<b>GRAND TOTAL REVENUE</b>	<b>\$ 1,783,670</b>	<b>\$ 1,962,970</b>	<b>10%</b>	<b>\$ 1,406,250</b>	<b>\$ 1,503,350</b>	<b>7%</b>	<b>\$ 2,190,085</b>	<b>\$ 1,630,384</b>	<b>-26%</b>	<b>\$ 741,500</b>	<b>\$ 273,700</b>	<b>-63%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>\$ 5,370,404</b>
<b>Operating Expenses</b>																
Salaries	\$ 360,178	\$ 371,791	3%	\$ 191,191	\$ 199,739	4%	\$ 869,431	\$ 646,738	-26%	\$ 20,091	\$ 19,898	-1%	\$ 397,887	\$ 453,476	14%	\$ 1,691,642
Benefits	212,191	217,874	3%	113,158	118,531	5%	402,229	347,081	-14%	11,393	9,669	-15%	235,118	263,317	12%	956,472
Equip, Auto, Maint, & Repairs	200,600	139,900	-30%	68,600	72,100	5%	216,000	105,900	-51%	31,050	23,200	-25%	12,800	13,200	3%	354,300
Materials & Supplies	51,200	50,200	-2%	6,200	6,500	5%	9,900	13,200	33%	1,900	1,900	0%	4,200	4,200	0%	76,000
Outside Services	43,200	31,900	-26%	28,000	26,600	-5%	29,700	26,300	-11%	4,500	4,700	4%	105,200	42,300	-60%	131,800
Other (Utilities, Prop/Liab Ins, TUD)	260,100	260,100	0%	699,500	707,500	1%	122,900	146,400	19%	32,500	35,800	10%	86,300	92,500	7%	1,242,299
Debt Service	110,539	110,390	0%	16,939	-	-100%	-	-	0%	-	-	0%	-	-	0%	110,390
<b>Total Program Expenses</b>	<b>\$ 1,238,008</b>	<b>\$ 1,182,155</b>	<b>-5%</b>	<b>\$ 1,123,588</b>	<b>\$ 1,130,970</b>	<b>1%</b>	<b>\$ 1,650,160</b>	<b>\$ 1,285,619</b>	<b>-22%</b>	<b>\$ 101,434</b>	<b>\$ 95,166</b>	<b>-6%</b>	<b>\$ 841,505</b>	<b>\$ 868,993</b>	<b>3%</b>	<b>\$ 4,562,902</b>
Administrative Cost Allocation	395,507	408,427	3%	210,376	217,248	3%	151,471	156,419	3%	84,150	86,899	3%	(841,505)	(868,993)	3%	-
<b>GRAND TOTAL OPERATING EXPENSES</b>	<b>\$ 1,633,515</b>	<b>\$ 1,590,582</b>	<b>-3%</b>	<b>\$ 1,333,964</b>	<b>\$ 1,348,218</b>	<b>1%</b>	<b>\$ 1,801,631</b>	<b>\$ 1,442,038</b>	<b>-20%</b>	<b>\$ 185,584</b>	<b>\$ 182,065</b>	<b>-2%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>\$ 4,562,903</b>
<b>TOTAL OPERATING BALANCE</b>	<b>\$ 150,155</b>	<b>\$ 372,388</b>		<b>\$ 72,286</b>	<b>\$ 155,132</b>		<b>\$ 388,454</b>	<b>\$ 188,346</b>		<b>\$ 555,916</b>	<b>\$ 91,635</b>		<b>\$ -</b>	<b>\$ -</b>		
<b>Capital Expenses</b>																
Capital Outlay	865,000	972,200	12%	392,000	519,800	33%	496,005	296,000	-40%	674,700	104,200	-85%	-	-	0%	1,892,200
<b>Total Capital Expenses</b>	<b>\$ 865,000</b>	<b>\$ 972,200</b>	<b>12%</b>	<b>\$ 392,000</b>	<b>\$ 519,800</b>	<b>33%</b>	<b>\$ 496,005</b>	<b>\$ 296,000</b>	<b>-40%</b>	<b>\$ 674,700</b>	<b>\$ 104,200</b>	<b>-85%</b>	<b>\$ -</b>	<b>\$ -</b>		<b>\$ 1,892,200</b>
<b>GRAND TOTAL EXPENSES</b>	<b>\$ 2,498,515</b>	<b>\$ 2,562,782</b>	<b>3%</b>	<b>\$ 1,725,964</b>	<b>\$ 1,868,018</b>	<b>8%</b>	<b>\$ 2,297,636</b>	<b>\$ 1,738,038</b>	<b>-24%</b>	<b>\$ 860,284</b>	<b>\$ 286,265</b>	<b>-67%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>\$ 6,455,103</b>
<b>Transfer To/(From) Reserve</b>	<b>\$ (714,845)</b>	<b>\$ (599,812)</b>		<b>\$ (319,714)</b>	<b>\$ (364,668)</b>		<b>\$ (107,551)</b>	<b>\$ (107,654)</b>		<b>\$ (118,784)</b>	<b>\$ (12,565)</b>		<b>\$ -</b>	<b>\$ -</b>		<b>\$ (1,084,699)</b>

Twain Harte Community Services District

2025-2026 Budget

ADMIN - REVENUE

BUDGET ITEM	BUDGET		CHANGE		REASON FOR CHANGE
	24/25 Approved	25/26 Proposed	\$	%	

Other Revenue					
Grant Revenue			\$ -	0%	
Miscellaneous Revenue	1,000	1,000	-	0%	
Interest Revenue			-	0%	
Lease Revenue			-	0%	
Sale of Assets			-	0%	
Other			-	0%	
<b>TOTAL OTHER REVENUE</b>	<b>\$ 1,000</b>	<b>\$ 1,000</b>	<b>\$ -</b>	<b>0%</b>	

<b>GRAND TOTAL REVENUE</b>	<b>\$ 1,000</b>	<b>\$ 1,000</b>	<b>\$ -</b>	<b>0%</b>	
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Twain Harte Community Services District

2025-2026 Budget

ADMIN - EXPENSES

BUDGET ITEM	BUDGET		CHANGE		REASON FOR CHANGE
	24/25 Approved	25/26 Proposed	\$	%	

Salaries - 51XXX					
Regular Time	\$ 368,924	\$ 434,336	65,412	18%	2% COLA, Step Increases, Added Positions
Uniform Allowance	83	0	(83)	-100%	
Sick Leave/Vacation Pay	20,000	10,000	(10,000)	-50%	More last FY due to retirement
Director Stipends	8,880	8,880	0	0%	
Cell Phone Stipend	0	259	259	259%	
<b>TOTAL SALARIES</b>	<b>\$ 397,887</b>	<b>\$ 453,476</b>	<b>\$ 55,588</b>	<b>14%</b>	

Benefits - 52XXX					
Health & Vision Insurance	\$ 87,391	\$ 115,268	\$ 27,877	32%	Added 0.8FTE Acctant/0.5FTE Eng Tech
HRA Reimbursement	30,291	31,658	1,366	5%	Added 0.8FTE Acctant/0.5FTE Eng Tech
Retirement	80,583	77,520	(3,063)	-4%	Employee Retirement
FICA	24,331	26,359	2,028	8%	Added 0.8FTE Acctant/0.5FTE Eng Tech
Medicare	6,401	7,050	650	10%	
Workers Comp	4,832	4,600	(232)	-5%	
Unemployment Ins/ETT	1,288	862	(426)	-33%	
<b>TOTAL BENEFITS</b>	<b>\$ 235,118</b>	<b>\$ 263,317</b>	<b>\$ 28,199</b>	<b>12%</b>	

Equipment, Automotive, Maintenance & Repairs					
Equipment Maintenance & Repair	\$ 1,500	\$ 1,500	\$ -	0%	
Facilities Maintenance & Repair	4,000	4,000	0	0%	
Janitorial/Cleaning Services	500	700	200	40%	
Fuel	1,800	1,800	0	0%	
Equipment Under \$5,000	5,000	5,200	200	4%	
<b>TOTAL EQUIP, AUTO, MAINT &amp; REPAIRS</b>	<b>\$ 12,800</b>	<b>\$ 13,200</b>	<b>\$ 400</b>	<b>3%</b>	

Materials & Supplies - 54XXX					
Office Supplies	\$ 2,400	\$ 2,400	\$ -	0%	
Postage	1,300	1,400	100	8%	
Janitorial Supplies	500	400	(100)	-20%	
<b>TOTAL MATERIALS &amp; SUPPLIES</b>	<b>\$ 4,200</b>	<b>\$ 4,200</b>	<b>\$ -</b>	<b>0%</b>	

Twain Harte Community Services District

2025-2026 Budget

ADMIN - EXPENSES

BUDGET ITEM	BUDGET		CHANGE		REASON FOR CHANGE
	24/25 Approved	25/26 Proposed	\$	%	
<b>Outside Services - 55XXX</b>					
Auditing/Accounting Services	\$ 74,900	\$ 29,000	\$ (45,900)	-61%	Reduced RGS Consulting due to Accountant Hire
Legal Fees	7,000	6,000	(1,000)	-14%	
IT Services	4,500	4,000	(500)	-11%	
Medical Exams	0	0	0	0%	
Other Professional Services	\$ 18,800	\$ 3,300	(15,500)	-82%	Removed Virtual Receptionist
<b>TOTAL OUTSIDE SERVICES</b>	<b>\$ 105,200</b>	<b>\$ 42,300</b>	<b>\$ (62,900)</b>	<b>-60%</b>	
<b>Other - 56XXX</b>					
Utilities	\$ 9,100	\$ 8,900	\$ (200)	-2%	
Phone/Communications	4,600	4,800	200	4%	
Software Licenses & Maintenance	22,100	24,000	1,900	9%	Software subscription rate increases
Property/Liability Insurance	16,400	16,000	(400)	-2%	
Dues & Memberships	6,700	7,700	1,000	15%	LAFCO membership increase
Licenses & Certifications	500	700	200	40%	
Training, Conferences & Travel	24,400	27,900	3,500	14%	Staff attendance at more conference trainings
Advertising & Public Education	1,000	1,500	500	50%	
Bank/Investment Fees	1,500	1,000	(500)	-33%	
<b>TOTAL OTHER</b>	<b>\$ 86,300</b>	<b>\$ 92,500</b>	<b>\$ 6,200</b>	<b>7%</b>	
<b>GRAND TOTAL EXPENSES</b>	<b>\$ 841,505</b>	<b>\$ 868,993</b>	<b>\$ 27,488</b>	<b>3%</b>	
Admin Transfer Out	\$ (841,505)	\$ (868,993)	\$ 27,488		
<b>GRAND TOTAL WITH TRANSFER</b>	<b>\$ -</b>	<b>\$ -</b>			

## RESERVE SUMMARY

As Of June 30, 2024

	Water	Sewer	Fire	Parks	Total
<b>Non-Spendable</b>					
Invested in Capital Assets	\$ 3,226,715	\$ 893,084	\$ 1,741,201	\$ 3,727,327	\$ 9,588,327
Inventory	\$ 25,694	\$ 8,103	\$ -	\$ -	\$ 33,797
<b>Total Non-Spendable</b>	<b>\$ 3,252,409</b>	<b>\$ 901,187</b>	<b>\$ 1,741,201</b>	<b>\$ 3,727,327</b>	<b>\$ 9,622,124</b>
<b>Restricted</b>					
Restricted Donations	\$ -	\$ -	\$ -	\$ -	\$ -
Debt Service	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Restricted</b>	<b>\$ -</b>				
<b>Committed</b>					
Capital Improvement/Asset Replacement Reserve	\$ 1,910,206	\$ 905,577	\$ 687,136	\$ 385,489	\$ 3,914,703
Rate/Revenue Stabilization Reserve	\$ 163,258	\$ 135,812	\$ 66,651	\$ 12,235	\$ 377,956
Water Rights Reserve	\$ 120,083	\$ -	\$ -	\$ -	\$ 120,083
<b>Total Committed</b>	<b>\$ 2,193,547</b>	<b>\$ 1,041,390</b>	<b>\$ 753,787</b>	<b>\$ 397,724</b>	<b>\$ 4,386,447</b>
<b>Assigned</b>					
Operating Reserve	\$ 389,498	\$ 333,998	\$ 714,240	\$ 93,877	\$ 1,531,615
Pension Liability	\$ (116,067)	\$ (62,500)	\$ (140,435)	\$ -	\$ (319,002)
<b>Total Assigned</b>	<b>\$ 273,431</b>	<b>\$ 271,498</b>	<b>\$ 573,805</b>	<b>\$ 93,877</b>	<b>\$ 1,212,613</b>
<b>PROPOSED ENDING BALANCE - FY 23/24</b>	<b>\$ 5,719,387</b>	<b>\$ 2,214,075</b>	<b>\$ 3,068,793</b>	<b>\$ 4,218,928</b>	<b>\$ 15,221,183</b>

24/25 Estimated Transfer To/(From) Reserve					
Water Rights Reserve					\$ -
Rate/Revenue Stabilization Reserve	\$ 5,902	\$ 8,888			\$ 14,790
Operating Reserve	\$ 8,147	\$ 3,056	\$ 6,779		\$ 17,982
Capital Improvement/Asset Replacement Reserve	\$ (13,894)	\$ (46,581)	\$ 22,378	\$ (84,260)	\$ (122,356)
<b>TOTAL TRANSFERS TO/(FROM) RESERVE</b>	<b>\$ 155</b>	<b>\$ (34,637)</b>	<b>\$ 29,157</b>	<b>\$ (84,260)</b>	<b>\$ (89,585)</b>

## RESERVE SUMMARY

As Of June 30, 2025 (Projected)

	Water	Sewer	Fire	Parks	Total
<b>Committed</b>					
Capital Improvement/Asset Replacement Reserve	\$ 1,896,312	\$ 858,997	\$ 709,514	\$ 301,229	\$ 3,792,347
Rate/Revenue Stabilization Reserve	\$ 169,160	\$ 144,700	\$ 66,651	\$ 12,235	\$ 392,746
Water Rights Reserve	\$ 120,083	\$ -	\$ -	\$ -	\$ 120,083
<b>Total Committed</b>	<b>\$ 2,185,555</b>	<b>\$ 1,003,697</b>	<b>\$ 776,165</b>	<b>\$ 313,464</b>	<b>\$ 4,278,881</b>
<b>Assigned</b>					
Operating Reserve	\$ 397,645	\$ 337,054	\$ 721,019	\$ 93,877	\$ 1,549,596
Pension Liability	\$ (116,067)	\$ (62,500)	\$ (140,435)	\$ -	\$ (319,002)
<b>Total Assigned</b>	<b>\$ 281,578</b>	<b>\$ 274,554</b>	<b>\$ 580,584</b>	<b>\$ 93,877</b>	<b>\$ 1,230,594</b>
<b>PROPOSED ENDING BALANCE - FY 23/24</b>	<b>\$ 5,719,543</b>	<b>\$ 2,179,438</b>	<b>\$ 3,097,950</b>	<b>\$ 4,134,668</b>	<b>\$ 15,131,599</b>

### 25/26 Estimated Transfer To/(From) Reserve

Water Rights Reserve					\$ -
Rate/Revenue Stabilization Reserve					
Operating Reserve					
Capital Improvement/Asset Replacement Reserve	\$ (599,812)	\$ (364,668)	\$ (107,654)	\$ (12,565)	\$ (1,084,699)
<b>TOTAL TRANSFERS TO/(FROM) RESERVE</b>	<b>\$ (599,812)</b>	<b>\$ (364,668)</b>	<b>\$ (107,654)</b>	<b>\$ (12,565)</b>	<b>\$ (1,084,699)</b>

Projected Capital Reserve as of 6/30/25	\$ 1,296,501	\$ 494,329	\$ 601,860	\$ 288,664	\$ 2,707,649
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# Addressing Vacancies: Taking a Closer Look at California's New Law, AB 2561

Published On: February 11, 2025

Staffing vacancies in public agencies are undeniably a pressing issue. When positions remain unfilled, current employees must take on additional workloads, often resulting in burnout, lower morale, and diminished service quality. These challenges impact employees and the public's trust in government operations. California's Assembly Bill 2561, effective January 1, 2025, aims to address persistent staffing vacancies in public agencies and introduce greater transparency in public sector staffing by

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public agencies confront staffing shortages more effectively. Yet, questions remain about whether the law will deliver the intended results without imposing additional burdens on agencies.

AB 2561 mandates that public agencies present data at public hearings before finalizing their budgets, aiming to create a forum for accountability. During these hearings, agencies must disclose staffing levels, vacancy rates, recruitment data, and employee retention data, as well as a report on a review of policies and practices that may hinder hiring and employee retention. Additionally, for agencies with vacancy rates that exceed 20% in a single bargaining unit, AB 2561 requires extra data tracking. AB 2561 requires agencies to provide employee organizations with an opportunity to participate in public hearings. Including employees and bargaining units in public discussions about staffing challenges could foster collaboration and provide valuable insights.

This new law will also require many agencies to rethink how they collect and store data related to approved position allocations, recruitment, hiring, and employee retention. Many small cities and special districts do not have human resources staff, let alone savvy human resources information systems. Compiling these reports may drive them

The implications of AB 2561 are significant for many government agencies. Many agencies have historically relied on “vacancy savings”—the practice of using unspent salary funds from unfilled positions to balance budgets. While AB 2561 may promote accountability around this practice, it does not address the structural funding gaps that drive it.

Ultimately, AB 2561 represents an effort to address staffing issues in California’s public sector, but its effectiveness will depend on how well agencies can implement its requirements. While compliance with AB 2561 might seem daunting, understanding where your organization stands is the first step.

Once the current status is identified, organizations have a choice about strategy. Simply complying with the data reporting requirements may not result in progress. By collecting and analyzing the right metrics and working collaboratively to obtain insight from employees, many organizations will learn that being an employer of choice is not all about salary.

Agencies will have to scrutinize their recruitment, hiring, and retention strategies and ask themselves:

processes?

- Are we an employer of choice in our region? If not, what can we change to become one?
- Does our workplace culture encourage employees to stay?
- What is unique about our working conditions?
- Does our organization regularly survey salary and benefits in our region?
- Can we improve the employee offerings without breaking the budget?
- Are we collecting the correct data to understand these questions and make good decisions about where to spend our efforts and money?

Organizations that take this opportunity to learn and improve can lower vacancy rates and increase employee retention. Will change happen overnight? No. Sustainable change takes time and Human Resources expertise is key. Becoming and continuing to be an employer of choice requires ongoing effort. Agencies that commit to improving organizational culture, employee engagement and retention efforts, recruitment processes, and hiring practices will shine.

Fanni Acosta | Human Resources Service Line Lead



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# AB 2561 - Required and Recommended Metrics

## Required by law

Metrics	Definition	Formula	Example
<b>FTE (Full Time Equivalent)</b>	Organization's total number of approved positions. Some Full Time positions may be comprised from smaller percentages of FTE approved.	sum of total number of positions identified as FTE	Total # of positions: <b>500</b> # of positions identified as FTE: <b>450</b> # of FTE: 450
<b>Average time to Hire</b>	Measures the average number of days it takes to fill a job vacancies.	sum of (days to fill each position)/ total number of positions filled	Position 1: <b>60 days</b> Position 2: <b>90 days</b> Position 3: <b>50 Days</b> Total # of positions filled: <b>3</b>  Avg. Time to Hire = $(60+90+50)/3 = 200/3 = 66.7$ days
<b>Vacancy Rate</b>	Measures the percentage of unfilled positions within an organization.	(# of vacant positions/total # of positions) x 100	Total budgeting positions: <b>200</b> Number of vacant positions: <b>15</b>  Vacancy Rate: $(15/200) \times 100 = 7.5\%$
<b>Vacancy Rate (Bargaining Unit)</b>	Measure the percentage of unfilled positions within a specific bargaining unit.	(# of vacant positions in BU/ total # of positions in BU) x 100	Total budgeting positions in BU: <b>200</b> Number of vacant positions in BU: <b>15</b>  Vacancy Rate in BU: $(15/200) \times 100 = 7.5\%$
<b>Retention Rate</b>	Measures the percentage of employees who remain with an organization over a given period of time.	(# of employees at end of period/ # of employees at start of period) x 100  <b>** Note-- This metric can be grouped by Department, BU, Supervisor, etc.</b>	Employees at start of the year: <b>500</b> Employees at the end of the year: <b>450</b>  Retention Rate: $(450/500) \times 100 = 90\%$  <b>**rule of thumb: high retention &gt;90%; low retention rate &lt;80%</b>
<b>Average Turnover Rate</b>	Measures the percentage of employees who leave an organization over a given period.	(# of employees who separate during the period/ average # of employees during period) x 100  <b>** Note-- This metric can be grouped by Department, BU, Supervisor, etc.</b>	Employees at the start of the year: <b>500</b> Employees at the end of the year: <b>450</b> Total separations during the year: <b>60</b>  1) avg # of employees = $(500+450)/2 = 475$ 2) Turnover Rate = $(60/475) \times 100 = 12.6\%$



# Recommended Measures

Metrics	Definition	Formula	Example
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<b>Average Tenure</b>	Measures the average length of time employees stay with an organization.	total years of service of all employees/total # of employees  <i>** Note-- This metric can be grouped by Department, BU, Supervisor, etc.</i>	# of employees: <b>5</b> Individual tenure of each employee (years): <b>3,5,8,2,4</b>  Total years of service: 3+5+8+2+4 = <b>22</b> Average Tenure = 22/5 = <b>4.4 years</b>
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<b>Average Time to Recruit</b>	Measures the length of time from when the recruitment opens TO creation of the list created of qualified candidates	sum of (recruitment open TO list created in days)/ total# of positions recruited	Position 1: <b>30 days</b> Position 2: <b>45 days</b> Position 3: <b>25 Days</b> Sum of recruitment open to list created: 30+45+25 = <b>100</b>  Total # of positions filled: <b>3</b>  Avg. Time to Recruit = 100/3 = <b>33.3 days</b>
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<b>Acceptance Rate</b>	Measures the percentage of job offers that candidates accept relative the the number of offers made.	( # of offers accepted/total # of offers made) x 100	# of offers accepted: <b>17</b> total # of offers made: <b>50</b>  Acceptance Rate: (17/50) x 100 = <b>34%</b>
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<b>Cost per hire</b>	Measures the expenses associated with hiring an employee.	total recruitment costs/total number of hires	Total recruitment costs: <b>\$50,000</b> Total # of hires: <b>10</b> Cost per hire = \$50,000/10 = <b>\$5,000</b>  Internal Recruitment Costs can include: <b>Recruiter salaries; HR team time spent hiring; Hiring manager time</b>  External Recruitment Costs can include: <b>job postings/ads; consultant fees; background checks, assessments</b>
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<b>Early Turnover</b>	Measures the percentage of employees who leave within their first year of employment.	(# of employees who separate within their first year/ total # of new hires in the year) x 100	Total new hires in a year: <b>100</b> # of employees separated within their first year: <b>15</b>  Early Turnover Rate = (15/100) x 100 = <b>15%</b>
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### Voluntary Turnover Rate

Measures the percentage of employees who voluntarily separate during a given time period.

(# of voluntary separations during a period / average # of employees during the period) x 100

Avg. # of employees = (starting headcount + ending headcount)/2

Employees at the start of the year: **500**  
Employees at the end of the year: **450**  
Total voluntary separations during the year: **60**

1) avg # of employees =  $(500+450)/2 = 475$   
2) Voluntary Turnover Rate =  $(60/475) \times 100 = 12.6\%$

### Involuntary Turnover Rate

Measures the percentage of employees who involuntarily separate during a given time period.

(# of involuntary separations during a period / average # of employees during the period) x 100

Avg. # of employees = (starting headcount + ending headcount)/2

Employees at the start of the year: **500**  
Employees at the end of the year: **450**  
Total involuntary separations during the year: **30**

1) avg employees =  $(500+450)/2 = 475$   
2) Involuntary Turnover Rate =  $(30/475) \times 100 = 6.3\%$

### Regrettable Turnover Rate

Measures the percentage of voluntary separations of employees who have been identified as high-performing, high-potential, or critical.

(# of regrettable separations during a period / average # of employees during the period) x 100

Avg. # of employees = (starting headcount + ending headcount)/2

Employees at the start of the year: **500**  
Employees at the end of the year: **450**  
Total separations during the year: **20**

1) avg employees =  $(500+450)/2 = 475$   
2) Regrettable Turnover Rate =  $(20/475) \times 100 = 4.2\%$

### Average Overtime Rate per employee

Measures the average number of overtime hours worked by employees within a specific time period.

Total # of overtime hours worked by employees within a specific timeframe / # of employees during the time period.

**\*\* Note-- This metric can be grouped by Department, BU, Supervisor, etc.**

Total # of overtime hours worked by employees from start of year to end of year = **300**

Headcount: **75**

Average Overtime Rate per employee =  $300/75 = 4$  hours

### Absence Rate

Measures the absence rate for an employee during a given time period.

(Total Unplanned Absences during a specific time period / Total Scheduled Workdays during a specific time period) x 100

Total Unplanned Absences = **23**  
Total Scheduled Workdays = **250**  
Absence Rate =  $(23/250) \times 100 = 9.2\%$

### Employee Engagement

Measures how invested and enthusiastic employees are about their work. High employee engagement leads to increased productivity, improved customer service, and lower turnover.

These are typically measured through surveys distributed to employees. The specific calculation will depend on the survey design and scoring system used.

RGS can help develop and deliver meaningful and research-backed employee engagement surveys.

