



Proposal
for
Employee Disciplinary Investigations
RFP 23-038

Prepared for:

City of Carson, California

Prepared by:

Stafford HR Consulting, LLC

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November 8, 2023

City of Carson
701 East Carson Street
Carson, CA 90745
RFP 23-038 EMPLOYEE DISCIPLINARY INVESTIGATIONS

Stafford HR Consulting (SHRC) is pleased to submit this proposal detailing how our firm can assist the City of Carson with conducting employee disciplinary investigations needs. SHRC is women-owned, based in Long Beach, California, and provides an innovative approach to human resources management services for public agencies.

SHRC's strength is based on working for public agencies in California with strong experience with the state's unique regulatory environment, challenging union environment, and extensive experience working within a classified employment system in conducting misconduct/employment investigations.

Investigations Experience

As the Principal, I have 30+ years of municipal human resources experience working for three southern California cities. Working for three public agencies, I oversaw and/or personally conducted more than 500 employee investigations in all areas and occupations. This includes public safety, public works personnel, professional and support staff, field employees and management personnel. The allegations have ranged from attendance issues, fraud, theft, workplace violence, misuse of City resources, sexual harassment, abusive conduct, drug and alcohol abuse, safety violations, insubordination, vehicle accidents and many more.

As the Deputy Director of Human Resources for the City of Long Beach, I was responsible for managing the employee relations program for the entire 7,000-person workforce, which included city-wide management of the City's disciplinary process and program for 24 City departments. In this capacity, I provided oversight to not only the civilian disciplinary investigations, but public safety as well, sitting with the Chief of Police and the Fire Chief in their Internal Affairs briefings deciding whether to proceed with an action against a sworn employee. I have also personally conducted investigations of non-sworn peace officers where the rules of POBAR apply.

I also oversaw the city-wide EEO unit which was responsible for conducting EEO complaint intake and investigations. I hired and trained a new analyst while overseeing this unit in addition to managing the program city-wide from a risk mitigation approach.

In addition to the above, while working in both Long Beach and Lynwood, I set up a training program for new HR practitioners to learn how to properly conduct and investigation, how to write the investigative report and skelly letter and how to conduct a skelly hearing. I created a shared, confidential site of exemplars so that staff would have examples of prior investigations for consistency and support. These systems provided for continuity that did not exist when experienced investigators left the City.

What Sets Us Apart?

Our experience in working for three municipalities conducting all range of personnel investigations on the full range of a municipal workforce, the ability to create a Skelly report/letter and adapt to the City of Caron's existing style. We are not an attorney firm and, as such, are able to draw conclusions between the investigation and policy violations with a practical approach, through an **equity lens**.

By submitting a proposal, Stafford HR Consulting, LLC agrees and acknowledges that it will provide for the duration of the project, the full complement of staff required to perform the work, including the specific individuals identified in this RFP.

SHRC acknowledges and accepts the terms and conditions as listed in the Request for Proposal document and has no changes to the standard professional services agreement.

Sincerely,



Cyndi Stafford, MPA, IPMA-CE
Principal/Owner

PROJECT UNDERSTANDING

The City of Carson desires to engage the professional services of experts to conduct independent investigative services for disciplinary and misconduct matters. These services will serve to supplement the current workload of the Department of Human Resources, and other Citywide departments, and will be requested on an as needed basis.

Stafford HR Consulting, in conjunction with the City of Carson Human Resources Department and City Attorney, will provide professional investigative services for disciplinary matters, ensure they are completed in a timely and objective manner and within established government regulations with the required expertise and knowledge.

SHRC can provide services including but not limited to: Administrative and/or disciplinary investigations, which includes confidential employee investigations into allegations of misconduct, violation of departmental rules and regulations, violation of state and/or federal laws, involving both union represented and non-represented employees, and/or classified and non-classified employees. The professional services will include conducting interviews, analyzing evidence, and assessing witness credibility, summarizing the case in a written investigative report that maybe used to take disciplinary action and is subject to a Civil Service appeal process; Written and/or oral reports that update the Department of Human Resources or other written reports detailing current and closed investigations as may be required. SHRC will also be available to testify at Civil Service hearings.

PROJECT DELIVERY

After meeting with the agency to determine the scope of the investigation, our process includes the following methodology.

Methodology

- Review of applicable laws and City regulations and policies, including MOU's.
- Review and analysis of the evidence, including any photos, videos, emails, text messages, documents, GPS data, etc.
- Interview of the supervisor/subject matter expert.
- Interview of the complaining party, if applicable
- Interview of the witnesses.
- Interview of the accused.
- Follow up on evidentiary leads.
- Analysis of the facts and areas of dispute.
- Assessment of the witness credibility.
- Written report, including conclusions reached as a result of the investigation.
 - The report includes:
 - What precipitated the investigation.

- A summary of the facts gathered throughout the investigation, including a chronology of events.
- The people interviewed and the documents reviewed.
- Summary of the witness statements.
- A brief discussion of any credibility assessments reached.
- Whether the report was substantiated or unsubstantiated or the results were inconclusive. If substantiated, what conclusions are supported by what was found.
- The specific conclusion(s) reached on each key issue.
- The identification of any issues that could not be resolved in the investigation.
- A brief discussion of how the City's guidelines or policies apply to the situation.
- Whether a breakdown in an internal control occurred to allow the claimed problem to occur.
- Whether any relevant internal controls were followed to prevent other problems or reduce the impact.
- For what period did the problem occur.
- A list of the documents gathered for the investigation.
- Generally, the Final Report offers no recommendations regarding how an employee should be disciplined, whether the agency should transfer someone, or similar post investigation activity. Those steps are outside the scope of the investigation. However, recommendations can be included, if requested by the City of Carson.
- Testify at a Civil Service hearing if needed.

All the above are done through an equity lens.

Additional Considerations

1. As retired public sector HR executives, SHRC consultants all have extensive experience in the following:
 - Working with employee associations/unions.
 - Working with classified and unclassified personnel.
 - Working with POBAR/FFBOR regulations.
 - Developing Skelly packages.
 - Conducting the Skelly meetings.
 - Conducting the appeal hearing and testifying.
2. All investigators are local to the Long Beach area and are able to conduct the investigations either in person, remotely or a combination of both.

3. Generally, SHRC can kick off an investigation within one week of being assigned, and a standard investigation can usually be completed within 30 days. Investigations with a large number of witnesses or a significant amount of evidence or charges can take 60-90 days.
4. If needed, SHRC can prepare the Skelly package on behalf of the City of Carson, including charges and all evidence upon which the proposed action is based, using the City's current style/practices.
5. In conducting the investigation, SHRC keeps in mind the following, as developed by Carroll Daughtery:

A PRACTICAL APPROACH TO JUST CAUSE: SEVEN KEY TESTS

These tests, in the form of questions, represent the most specifically articulated analysis of the just cause standard as well as an extremely practical approach.

- **NOTICE:** Did the employer give to the employee forewarning or foreknowledge of the possible or probable consequences of the employee's disciplinary conduct?
- **REASONABLE RULE OR ORDER:** Was the employer's rules or managerial order reasonably related to (a) the orderly, efficient, and safe operation of the employer's business, and (b) the performance that the employer might properly expect of the employee?
- **INVESTIGATION:** Did the employer, before administering the discipline to an employee make an effort to discover whether the employee did in fact violate or disobey a rule or order of management?
- **FAIR INVESTIGATION:** Was the employer's investigation conducted fairly and objectively?
- **PROOF:** At the investigation, did the "judge" obtain substantial evidence or proof that the employee was guilty as charged?
- **EQUAL TREATMENT:** Has the employer applied its rules, orders and penalties even-handedly and without discrimination to all employees?
- **PENALTY:** Was the degree of discipline administered by the employer in a particular case reasonably related to (a) the seriousness of the employee's proven offense, and (b) the record of the employee in his/her/their service with the employer?

In keeping the 7 Tests of Just Cause in mind when conducting an investigation, SHRC provides a thorough and defensible work product.

FIRM QUALIFICATIONS

About Us

Stafford HR Consulting, LLC is a Woman-Owned (certification pending) full-service human resources firm for public agencies. We were founded in 2021 and provide a variety of human resources services to the public sector. Our workforce is diverse, with five females (one Black, two White, one Asian and one Latina), and one individual who identifies as LGBTQ+. In addition, we also have an additional female consultant who conducts our assessments that identifies as a member of the Latinx community.

Our Services

SHRC provides recruitment, classification and compensation analyses, labor and employee relations, organizational assessments, misconduct/EEO investigations, policy/procedure updates, and employee retention and engagement services for local government agencies.

Executive Recruiting

SHRC has 30+ years in the public sector for three agencies and has conducted successful executive recruitments at all three agencies, and in a variety of environments. We have successfully worked with unions, community members, stakeholders and elected and appointed officials at these agencies, and bring that experience to our current clients.

We approach recruiting with transparency, with the object of providing a diverse applicant pool for our clients. We know that no two agencies are alike and tailor our recruitment process to match your agency's culture and needs, while staying true to a recruitment process that is inclusive and fair.

With a deep understanding of the public sector's unique objectives and challenges, our firm builds a quality-focused search strategy that focuses on your unique organization that does not provide a formulaic process.

Classification & Compensation

SHRC provides classification and compensation analyses to public agencies. Services include analysis of existing classification systems and development of new classifications that factor in the needs of the agency and the regional labor market but allow the agency to be nimble. Compensation studies are benchmarked against comparable agencies that compete for the best talent and to ensure that agencies pay equitable wages relative to their job market.

Complaint Investigations

SHRC has 30+ years of conducting harassment and misconduct investigations in compliance with FEHA, Title VII, ADA, and Skelly provisions. Our firm has conducted 500+ investigations ranging from a simple complaint with two witnesses to one involving a systemic culture of bias and workplace harassment.

Labor/Employment Relations

SHRC has successfully conducted MOU negotiations and meet and confer processes with multiple employee associations, including sworn bargaining units, over new/updated policies, schedule changes, Personnel (Civil Service) Rule changes, drug testing, and layoff/concession bargaining, to name a few.

Employee Relations

At SHRC we work with agencies to create high-performing work environments built on trust, inclusivity, and accountability that is proven to lead to greater organizational success. Our Employee Relations services ensure your agency will be equipped to handle the complexities of public sector responsibilities, while at the same time creating an environment that's inclusive and well-aligned with your agency's culture.

SHRC offers a variety of programs, including organization assessments, DEIB program development, team assessments, succession planning, employee engagement and leadership development programs.

HR Program Assessment and Auditing

SHRC is able to conduct an assessment and analysis of your agency's human resources programs, policies, processes and staffing to ensure that you are legally compliant, implementing the industry's best practices for talent management, efficient in operations and providing appropriate and quality customer service.

Additional information about SHRC can be found at www.staffordhrconsulting.com.

TEAM EXPERIENCE

Project Team Summary

The Project Team leaders are Cynthia Stafford and Stacey Lewis. Cyndi has over 30 years working for three municipalities handling human resources work, including misconduct investigations, most recent as the Director of Human Resources & Risk Management with the City of Lynwood. Stacey has 30+ years working for public agencies, most recently as the Chief HRO for the Port of Long Beach. Sheryl Montgomery has 30+ years in the public sector, most recently as the Administrative Services Manager for Anaheim Fire & Rescue and provides quality control and project management assistance.



Organization Chart



Project Team



Cyndi Stafford, MPA, IPMA-CE

Cyndi Stafford has worked in the field of human resources for over 30 years. Her experience includes careers with public sector agencies with varying community services including airports, seaports, water, police, fire, emergency management, economic development and many more. She was most recently the Director of Human Resources & Risk Management for the City of Lynwood, California where she oversaw a staff involved in recruitment and selection, benefit administration, classification, and compensation, EEO, training, labor and employee relations and risk management, including workers' compensation, general liability, and contract risk transfer. Before joining the Lynwood team, Cyndi worked for the City of Long Beach, California, as the Deputy Director of Human Resources overseeing executive recruitment, benefits, training, EEO, classification and compensation, and employee relations functions. Before joining Long Beach, Cyndi worked for the Port of Long Beach as the Assistant Director/Acting Director of HR and the City of Los Angeles in various human resources positions for the Los Angeles Police Department, General Services, City Clerk and Sanitation departments.

Cyndi holds dual bachelor's degrees from the University of Southern California in Political Science and International Relations and a master's in public administration from California State University, Long Beach. As a life-long HR professional, Cyndi was one of the first in the country to achieve her Certification of IPMA-CE (Certified Executive) through the International Public Management Association for Human Resources. With Cyndi's extensive human resources experiences, she is frequently asked to speak and presents at conferences on a regular basis. Cyndi truly enjoys mentoring new female professionals in the workplace. See attached resume.



Stacey Lewis, IPMA-HR CE

Stacey Lewis is the Founder/CEO of HR Interrupted., a consultancy firm dedicated to providing expert and proven resources to business thought leaders who have GRIT to unapologetically disrupt outdated workplace ideologies, principle and practices that impact the People, Business and Culture experience. She is the former Chief Human Resources Officer for the Port of Long Beach, the second-busiest seaport in the United States, with approximately 530 employees and generates annual operating revenues in excess of \$300 million.

Stacey has over 30 years of professional human resources experience, both in the private and public sectors.

A dynamic and highly sought after “transformational” speaker and self-proclaimed disruptor, Stacey received her bachelor’s degree in psychology from the University of the Pacific. She also holds a Human Resources Management Certification from Loyola Marymount University, a Diversity, Equity and Inclusion Certification from Cornell University as well as several other professional HR designations/certification. Stacey is a former Commissioner for the Long Beach Unified School District Personnel Commission, as well as serving on several local boards including Girls Inc. of Los Angeles, Inglewood Baseball Fund and Little Owl Foundation for Childhood Education. Additionally, Stacey is an instructor/program liaison for the Human Resources Management Certification program at California State University, Long Beach, and is a member of their HR Advisory Committee. See attached resume.



Sheryl Montgomery, MPA, IPMA-SCP

Sheryl Montgomery has leveraged over 30 years of local government experience in the areas of Public Works, Finance, Community Development, Police and Fire into a reputation for expertise, professionalism, and collaborative management. Recently retired from the Administrative Services Manager for Anaheim Fire & Rescue, Sheryl has experience in the areas of Recruitment, Organizational Development, and Labor Relations.

She holds the IPMA-SCP certification and has been a SCPMA-HR Board member since 2014. Sheryl has helped her agencies with the unique perspective of an operating department Business Partner with credentials as a Human Resources professional.

Sheryl has a BA from California State University Fullerton in Business Administration/MIS and an MPA from California State University Long Beach in Public Administration and is an IPMA-SCP designation. See attached resume.



Harvie Kaur

Harvie works for a large public agency in Los Angeles County, where she supports City Departments with their HR needs including hiring, employee and labor relations, engagement, and training. Formally with the Port of Long Beach, Harvie handled recruitment and Employee Engagement for the Port. Harvie has nearly 15 years of human resources experience from the private

and public sectors in the areas of recruitment & selection, onboarding/offboarding, compensation and benefits, employee relations and engagement.

Harvie has a BS in Business Administration/Human Resources Management from California State University, Los Angeles and a Certification from Cornell University in Employee Relations and Investigations.



Alison Bacon

Alison Bacon is a skilled educator, administrator, and community leader. She has extensive experience in educational leadership, curriculum development and execution, workforce development, innovative training and development, adult learning methodologies, grant writing and public relations. She is an effective communicator and motivator who has spearheaded ambitious programs to achieve transformative results in a variety of public and private industries and professional environments. Currently, Alison is an Assistant Principal of Operations with the Los Angeles Unified School District's Division of Adult and Career Education. She is adept at collaborating and cultivating new and existing relationships with multilevel stakeholders and optimizing organizational efficiency through fluidity and transparency. Alison's leadership skills in cross-functional training and team building produce organizational-wide deliveries. She promotes a positive and vibrant atmosphere that ultimately enhances workplace efficacy and growth.

Alison received a bachelor's degree in business administration and a master's degree in organizational management from the University of Phoenix. She also holds an Adult Education Certification from the University of San Diego, a CLAD/CTEL Certification from the California State University, Long Beach and is a graduate of the USC School of Leadership program for educators.

SECTION 3: Cost Proposal Price

Consultant	Tasks List	Hourly Rate
Cynthia Stafford	<ul style="list-style-type: none"> ● Meet with the City. ● Review evidence and policies. ● Interview witnesses and accused. ● Analyze evidence and statements. ● Conduct credibility assessment. ● Prepare written report. ● Testify, if applicable. 	\$250
Stacey Lewis	<ul style="list-style-type: none"> ● Meet with the City. ● Review evidence and policies. ● Interview witnesses and accused. ● Analyze evidence and statements. ● Conduct credibility assessment. ● Prepare written report. ● Testify, if applicable. 	\$250
Sheryl Montgomery	<ul style="list-style-type: none"> ● Assist in project management including scheduling of interviews, note taking, etc. ● Conduct quality control of reports. 	\$125
Alison Bacon Harve Kaur	<ul style="list-style-type: none"> ● Additional investigators as needed. 	\$200

Client Reference List



Agency	City of Long Beach, CA
Investigations	<ul style="list-style-type: none"> • Sexual harassment • Hostile work environment • Poor performance • Timecard fraud • Positive drug test • Excessive absenteeism <ul style="list-style-type: none"> ▪ Abusive conduct ▪ Attendance issues ▪ Fraud ▪ Theft ▪ Workplace violence ▪ Misuse of City resources ▪ Drug and alcohol abuse ▪ Safety violations ▪ Insubordination ▪ Vehicle accidents ▪ Dishonesty <p>In 11 years with Long Beach, conducted or oversaw 150+ investigations.</p>
Dates Work Completed	2006-2017
Investigator	Cyndi Stafford
Point of Contact + Title	Debbie Mills, Human Resources Director (Ret.)
Address	411 West Ocean Blvd., Long Beach, CA 90802
Phone No	562.972.9539
Email	drmill555@aol.com



Agency	City of Lynwood, CA
Investigations	<ul style="list-style-type: none"> • Sexual harassment • Hostile work environment • Poor performance • Timecard fraud • Positive drug test • Excessive absenteeism • Intentional destruction of records • Abusive conduct.
Dates Work Completed	2018 - 2021
Investigator	Cyndi Stafford
Point of Contact + Title	Jose Ometeotl, City Manager (former)
Address	13301 Bullis Rd Lynwood, CA 90262
Phone No	951.219.3022
Email	ometeotl@classiclakeconsulting.com




Agency	City of Azusa
Work Performed	<ul style="list-style-type: none"> • Revised/created 32 Administrative Policies and conducted negotiations with 8 bargaining units on said policies. • Wrote FMLA procedures manual. • Conducted classification analysis for an 11-person classification. • Rewrote Civil Service Rules (in progress). • Provide other general HR assistance.
Dates Work Completed	2021-present
Project Team	Cyndi Stafford
Point of Contact + Title	Talika Johnson, Director of Administrative Services
Address	213 E. Foothill Blvd. Azusa, CA 91702
Phone No	626-334-6358
Email	tjohnson@azusaca.gov

ATTACHMENTS

Resumes

WWW.STAFFORDHRCONSULTING.COM :: CSTAFFORD@STAFFORDHRCONSULTING.COM :: 562.537.4055

CYNTHIA A. STAFFORD



EDUCATION

IPMA-HR CE (Certified Executive)
International Personnel Management Association – Human Resources

MPA – Public Policy + Administration
California State University, Long Beach

BA – Political Science
University of Southern California

CAREER SUMMARY

Human resources manager with over 30 years of dedicated, wide-ranging public sector human resources experience. Proven track record in all aspects of HR, including labor relations, classification/compensation, EEO and benefit administration, investigations, training, workers' compensation, and recruitment. Strong project management skills with a history of delivering on large and small HR projects. Extensive working relationships with key players in region and a strong network of HR executives in other local agencies.

EXPERIENCE

Principal/Owner **May 2021 – Present**
Stafford HR Consulting

Provide Human Capital consulting and services to public agencies nationally. As the Principal, manage projects for the firm on executive recruitments, organizational assessments, leadership development, HR consultation, employee engagement programs, risk analyses, DEI program creation and implementation, and classification and compensation analyses.

Director of Human Resources & Risk Management **January 2018 – May 2021**
City of Lynwood

Reporting to the City Manager, responsible for running the City's human resources, safety/disaster preparedness and risk management programs. Working with a staff of 5, responsible for:

- Classification/compensation analysis.
- EEO/ADA program administration, including discrimination complaint investigations; City-wide EEO Officer.
- Benefit administration for active and retired employees.
- City-wide training;
- Integrated disability management.
- Hiring (civil service and non-civil service) and onboarding of new employees.
- Workers' Compensation and Return to Work program.
- Employee relations (JLMCs and grievance response).
- City-wide Safety + Disaster Preparedness.
- Negotiate MOUs.
- Manage general liability and insurance programs.
- Misconduct investigations.

**Deputy Director-Human Resources
Manager, Personnel Operations
City of Long Beach, Human Resources Department**

**September 2015 – January 2018
April 2014 – September 2015**

Reported to the Director of Human Resources, responsible for managing the Personnel Operations Bureau in the Department of Human Resources which provides City-wide HR management and direction to 22 City Departments and 5,800 City employees. Worked with a staff of 15, responsible for:

- City-wide misconduct investigation program administration, including police and fire.
- Classification/compensation analysis.
- EEO/ADA program administration, including discrimination complaint investigations; City-wide EEO Officer
- HRIS system management.
- Benefit administration for active and retired employees.
- PERS safety and miscellaneous retirements.
- City-wide training.
- Integrated disability management.
- Provide a wide variety of data/analytics used by City management in decision making processes, response to media/elected official inquiries and budget process.

Also, review and approve legal settlements for employees and advise/guide Department Heads and managers on a wide variety of controversial or sensitive issues relating to employees.

Past Projects

- ERP Team member (and manager of module leads);
- Implementation of FLSA Audit recommendations.
- Several executive recruitments including Director of Economic Development, Director of Technology & Innovation; City Clerk (Reports to the Mayor), Deputy City Manager, and Director of Parks, Recreation and Marine.
- Revise Civil Service Rules & Regulations.
- PERS Audit (largest PERS audit to date) regarding skill pays in all bargaining units (affects all current and retired employees).
- Implemented employee newsletter and recognition program.

**Personnel Officer
City of Long Beach, Department of Public Works**

November 2007 – April 2014

Reported to the Director of Public Works and managed the Personnel Services Division which provided professional human resources and payroll services to the Departments of Public Works, Airport, Disaster Preparedness and Emergency Communications and the Fleet Services Bureau of the Financial Management Department (750 employees). Directed staff who provided the full range of human resources activities, including:

- Misconduct investigations.
- EEO Investigations; Acted as Department EEO Coordinator
- Hiring (civil service and non-civil service).
- Workers' Compensation and Return to Work program.
- Employee relations (JLMCs and grievance response).
- Payroll and new employee processing.
- Drug testing/DMV program for 150+ person commercial drivers.
- Onboarding of new employees.
- Department-wide Safety + Disaster Preparedness.
- Advised executive management on a wide variety of human resource and management issues.

Assistant Director of Human Resources

January 2006 – November 2007

Acting Director of Human Resources

January 2007 – August 2007

City of Long Beach, Port of Long Beach (Harbor Department)

Managed the Human Resources Division for the Port (350 employees), which included 18 positions and three sections: Personnel/Payroll, Special Services and Records Center.

- Directly handled executive or unclassified recruitments.
- Supervised and/or conducted discipline, workplace violence, EEO and sexual harassment investigations and acted as Skelly Officer.
- Conducted supervisory training.
- Managed the department's Workers' Compensation and Return to Work programs.
- Administered the management compensation plan (Hay point system).
- Developed, implemented, and interpreted the Department's salary resolution.
- Represented the Port before City boards and commissions and made presentations to the Board of Harbor Commissioners.
- Provided advice and guidance to supervisors and managers on human resource issues/problems.

Personnel Director (Senior Management Analyst II)

March 2001 – January 2006

City of Los Angeles, Bureau of Sanitation

Reported to the Director of Sanitation. Managed three sections through subordinate supervisors (40 total employees), engaged in Department-wide personnel, payroll, and general administrative support activities for 20 divisions and 2,900 regular authorities.

- Directed staff who provided the full range of human resources activities, including investigations, hiring, workers' compensation, employee relations, Return to Work program administration and compliance, and providing general personnel advice to supervisors, managers, and the executive team.
- Personally handled difficult or controversial employee relations issues, discipline investigations and EEO/sexual harassment cases.
- Reviewed, approved, and made final recommendations on all new and reclassified positions for the budget; created organization charts and maintained and amended the departmental personnel ordinance (salary resolution).
- Advised executive management on a wide variety of human resource and management issues and responsible for representing the Bureau before elected and appointed officials and at court proceedings.

PROFESSIONAL STRENGTHS

- Strategic HR Management.
- Comprehensive knowledge of all aspects of HR management.
- Strong working relationships within and outside of COLB, including agency partnerships.
- Aligning HR with operational goals to facilitate growth and progress.
- Leading, guiding and mentoring staff to increase their productivity and benefit to the organization.
- Organizational development and change management.

ACCOMPLISHMENTS

- Rebranded HR and created employee recognition and engagement program, including using social media to inform, recognize and involve employees.
- Premiered Web Based Onboarding System for all new employees.
- Successfully recruited a new Director of the Long Beach Airport, Director of Gas and Oil, Director of Parks, Recreation and Marine, Deputy City Manager for Long Beach and a Public Works Director, City Manager and Community Development Director for Lynwood.
- Successfully implemented a Dependent Care Audit and re-negotiated the health care contracts, saving Long Beach millions annually.

- Developed and managed through the meet and confer process several new personnel policies on Drug and Alcohol, hiring, absence management, hiring classified personnel, sexual harassment, and information technology.
- Revamped Lynwood's intranet site adding information on benefits, MOU's, policies, and forms, that was previously only available by request.
- Developed and presented two day-long training academies for more than 200 City personnel.
- Won an Innovation Award for successfully implementing innovative recruitment strategies to increase Long Beach's presence in the job market.
- Negotiated two labor contracts for Lynwood that included layoffs and concessions to respond to COVID-19 revenue losses.

PROFESSIONAL SPEAKING ENGAGEMENTS

- | | |
|--|----------------|
| ▪ "Personnel Rules Workshop" (Hermosa Beach, CA) | August, 2023 |
| ▪ "Succession and Workforce Planning" (SCPMA-HR Conference) | April, 2023 |
| ▪ Panel Discussion: "Vaccination Mandate and Hybrid Work Policies" | December, 2022 |
| ▪ "The Future of HR: How We Can Build the Organization of the Future" | March, 2022 |
| ▪ "Hiring in 2022" | February, 2022 |
| ▪ "Labor of Love – Creating Harmonious Relationships with Unions" (WRIMPA-HR Conference) | May, 2021 |
| ▪ "Ask the Experts" Panel (WRIMPA-HR Conference) | May, 2021 |
| ▪ "Renew the HR Script" (SCMPA-HR Conference) | March, 2021 |
| ▪ "Labor Negotiations During COVID-19: Lynwood's Journey" (SCPMA-HR Webinar) | February, 2021 |
| ▪ "Finding Your HR Niche" (CSULB/SCMPA-HR Webinar) | October, 2020 |
| ▪ "COVID-19: HR's Legal Responsibilities" (SCMPA-HR Webinar) | April, 2020 |
| ▪ "Transferable Skills for HR Professionals" (SCPMA-HR Conference) | April, 2019 |
| ▪ "Diversity & Inclusion" (SWANA Conference) | March, 2018 |
| ▪ "How HR Can Be a Strategic Partner" (SCPMA-HR Conference) | March, 2017 |

PROFESSIONAL MEMBERSHIPS

- Southern California Personnel Management Association (SCMPA – HR):
 - President Elect – 2023-2025
 - Vice President of Membership – 2021-2023
 - Governing Board Member-At-Large - 2016-2021
- SCPLRC
- CALPELRA
- PSHRA (formerly IPMA-HR)

STACEY V. LEWIS, SPHR, IPMA-SCP/CE, SHRM-CSP, AWI-CH

562 | 213•7843 | Stacey@HRInterrupted.com

EXECUTIVE PROFILE

- Accomplished, innovative, results-oriented executive with over 30 years of experience in all aspects of Human Resources management.
- Significant proven track record in developing impactful and sustainable Equity and Inclusion and HR business strategies and initiatives, implementing successful practices, organizational enhancements, performance measurements and other human resources & business processes.
- A strategic, savvy, nimble and politically astute collaborator, skilled in advising and supporting senior and middle management, while maintaining objectivity and credibility with line staff.
- Strong communicator with excellent presentation and organizational skills. Extensive and effective leadership experience in both the public and private sectors.

PROFESSIONAL EXPERIENCE

CALIFORNIA STATE UNIVERSITY, LONG BEACH *INSTRUCTOR/PROGRAM COORDINATOR*

2023-Present

Serves as an instructor in the Human Resources Management Certificate Program at CSULB. The program helps students enter or advance in the HR management profession. Developed by experts in the human resources profession, the courses included in the certificate program cover topics that are essential to the human resources function. Roles include designing curriculum, facilitating class discussions, and advising program coordinator on emerging HR trends to be included in the course curriculum.

HR INTERRUPTED – La Palma, California *CEO/FOUNDER/PRINCIPAL CONSULTANT*

2019 - Present

Organizational Development: Serves as People, Culture and Workplace Strategist to various organization. Areas of collaboration and responsibilities include Equity and Inclusion Practices and Services, Organizational Development/Change Management, Executive Collaborations Conversations (Coaching), Employee Engagement and Curriculum Development and Learning Facilitation.

Manage self-owned business, to include marketing, operations, scheduling, contracting and delivery to deadlines.

PORT OF LONG BEACH – Long Beach, California *CHIEF HUMAN RESOURCES/EQUITY AND INCLUSION OFFICER* 2017-2022 *ASSISTANT DIRECTOR OF HUMAN RESOURCES* 2009 - 2017

Served under the Board of Harbor Commissioners as number one executive in the Human Resources Division at the largest seaport complex in North America, with approximately 560 employees and an annual operating budget in excess of \$300 million. The Port of Long Beach is a department (Harbor) of the City of Long Beach, a full-service city.

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Budget: Managed the preparation and oversight of the divisions' budget of \$5M, including personnel and operating expenses.

Operations: Provided impactful and influential leadership of the department's day-to-day HR operations to ensure organizational alignment with the Port's mission. In collaboration with a team of 22 staff members, oversight included the business integration of all HR Centers of Excellence: Talent Acquisition and Retention, Performance Management, Employee and Labor Relations, Learning and Development, Leave Management, Data Analytics, Classification and Compensation and HR General Services (e.g., Payroll, Benefits, Perks). Extensive interaction with the Board of Harbor Commissioners, the Executive Director, Senior Leadership, Civil Service Commission, Hiring Managers, City Leadership Team and Community Stakeholders. Trusted advisor to Board of Harbor Commissioners and Executive Director on relevant diversity and HR issues. Considered as the Port's key expert and influencer on identifying and integrating proven and highly effective human resources practices.

Inclusion, Diversity, Equity and Belonging: Created the Port's first Office of Diversity, Equity, and Inclusion. Responsible for leading, influencing, inspiring, developing and executing plans, goals, policies, and key performance indicators to enhance the Port's Equity and Inclusion strategy. Develop Port's awareness strategy to build inclusive leadership, including collaborating with Executive Leadership and Hiring Leaders to find, attract, retain, engage, and optimize diverse talent with varied experiences and perspectives to ensure the Port remains an employer of choice.

Labor Relations: Lead the negotiation process, including preparation and strategy setting, while serving as Department Lead Negotiator and/or Second Chair in Port related collective bargaining matters. Develop and maintain cohesive and constructive relationships with union representatives. Facilitate high-level negotiations briefings including monthly Joint Labor Relations Committee meetings. Advised leadership on the interpretation of the various Memorandums of Understanding (MOU), while consistently maintaining comprehensive knowledge of applicable policies, practices, and procedures as it relates to the Port's labor relations efforts.

Employee Relations: Provided oversight for the Port's robust employee relations function, including overseeing all facets to ensure an equitable process is being followed for Port staff. Our offerings include conducting internal investigations, facilitating the grievance process and unemployment claims, advising management on disciplinary actions, performance improvement measures and interpreting memorandum of understandings, developing and reviewing hearing and trial materials and exhibits with counsel, appearing at administrative hearings and judicial trials as both the management representative and key witness to testimony.

Organizational & Team Development: Lead the Port's change management initiative by enhancing the Port's Port Wise training and development program, including designing, and delivering instructional classes for managers & employees which include *Effective Performance Management, Performance Coaching, Succession Planning, Talent Management, Leadership 101* and *Understanding the Recruitment Process*. Provide leadership for the Port's Summer High School and College Internship programs. Designed and implemented employee engagement and recognition activities such as Employee of the Year, Service Awards, the YOU MATTER award, virtual Back to School Nights and Latinx Heritage Month Celebrations.

Classification & Compensation: Instrumental in preparing annual Salary Resolution. Participate in various classification and compensation studies, development of position descriptions, job specifications, surveys, and analysis of existing salaries when determining compensation for employment and promotion offers.

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Policies & Procedures: Served as a credible and authoritative source to management regarding department policies and procedures, Federal, State, Local laws, and relevant HR case law. Create and revise new administrative directives to enhance processes, provide consistency and communicate procedures to managers and employees.

Technology & Systems: Implementation of automation and technology to streamline processes and provide efficient and effective customer service. Implemented systems include SparkHire (video interviewing) and TalentWise (web-based onboarding process) and an in-house training/learning management system created in Microsoft Access.

K. KENNEDY AND ASSOCIATES, LLC – Long Beach, California
CEO/PRINCIPAL CONSULTANT

2007 - 2009

Organizational Development: Served as Human Resources consultant to the City of Long Beach Harbor Department and five other municipalities/agencies: City of Torrance, City of Compton, City of Santa Fe Springs and CPS. Areas of responsibilities included Recruitment, Selection, Employee Relations, Labor Relations, Classification and Compensation Safety, Risk, Benefits, Performance Management, Leave Management, Organizational Development, Training and Development and HRIS.

Managed self-owned business, to include marketing, operations, scheduling, contracting and delivery to deadlines.

CITY OF TORRANCE – Torrance, California
CITY MANAGER'S OFFICE
CIVIL SERVICE MANAGER (2003-2007)
ASSISTANT NEGOTIATOR

1998-2007

The City of Torrance, a full-service city is the eight largest cities in Los Angeles County with approximately 1200 employees and an annual general fund budget of about \$160 million. Held a series of increasingly responsible HR leadership roles; eventually overseeing the Civil Service Commission function, processes, and programs.

Civil Service Commission: Served as Executive Officer to the Civil Service Commission. Proactively recommended changes in rules, policies, procedures and standards for presentation to the Commission. Considered a credible resource for advising the Commission, City Manager, Management and Employee Organizations in the interpretation of Civil Service rules and regulations, memorandum of understandings, municipal code, City policies and procedures and applicable state and federal laws.

Labor Relations: Prepared, planned, negotiated, and implemented collective bargaining agreement terms, policies and procedures as the Second Chair. Conducted data research associated with bargaining history of various Memorandums of Understanding (MOU). Established and maintained effective relationships with various union leaders and representatives. Served as Lead Negotiator/First Chair in the absence of Chief Negotiator.

Hearing Officer: Conducted comprehensive employee relations investigations and hearings, issued findings and prepared settlement reports.

EEO Officer: Managed the Equal Opportunity/Compliance Program. Served as the key advisor to employees and participants of their rights and responsibilities under the program, including reviewed,

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answered and advised individuals on complaints of discrimination. Established procedures for processing complaints pursuant to the appropriate federal and state mandated directives. Advised leadership on strategies to ensure a diverse, equitable and inclusive workforce and workplace.

Budget Planning: Established and effectively maintained department's operating budget of approximately \$1.1M.

OTHER EXPERIENCE: Worked in private sector in various management and administrative positions related to technical & other recruitment, employment, & employee services.

EDUCATION

Bachelor of Arts Psychology/Organizational Development (Graduated with Top Honors)	UNIVERSITY OF THE PACIFIC
Human Resources Management Certification	LOYOLA MARYMOUNT UNIVERSITY

PROFESSIONAL CERTIFICATIONS/CERTIFICATES

Senior Professional in Human Resources (SPHR)	HR CERTIFICATION INSTITUTE
Human Resources Certified Executive (IPMA-CE)	INTERNATIONAL PERSONNEL MANAGEMENT ASSOCIATION
Certified Senior Professional (SHRM-CPS)	SOCIETY OF HUMAN RESOURCES MANAGEMENT
Investigators Certificate Holder (AWI – CH)	ASSOCIATION OF WORKPLACE INVESTIGATORS
Diversity, Equity, and Inclusion Certification	CORNELL UNIVERSITY
Diversity, Equity, and Inclusion Certification	NATIONAL DIVERSITY COUNCIL

CURRENT and FORMER PROFESSIONAL AFFILIATIONS/COMMUNITY POSITIONS/RECOGNITION

- Recipient of the 2022 Muziel M. Morse Achievement Award of Excellence for HR Contributions
- Recipient of the 2020 Human Resources Award of Excellence from IPMA-HR
- Founding Member - CHIEF, Los Angeles
- Board Member – Girls Inc. of Los Angeles
- Board Member – Little Owl Foundation for Childhood Education
- Board Member – California State University Long Beach HR Advisory Board
- Board Member – Argyleforum.com HR Advisory Board

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- Board Member – Inglewood Baseball Fund
- Former Board Member – Southern California Public Management Association-Human Resources (SCPMA-HR)
- Former Board Member – Membership Access and Engagement Advisory Board – International Public Management Association – Human Resources (IPMA-HR)
- Association of Workplace Investigation (AWI)
- Professionals in Human Resources Associations (PIHRA)
- Society of Human Resources Management (SHRM)
- International Personnel Management Association for Human Resources (IPMA - HR)
- Southern California Labor Relations Council (SCLRC)
- California Public Employers Labor Relations Association (CALPELRA)
- Certified Port Executive (CPE)
- Recipient of the 2014 Employee of the Year – Port of Long Beach
- Former Executive Advisor – City of Long Beach Diversity, Equity and Inclusion Strategy Team
- Former Personnel Commissioner – Long Beach Unified School District
- Former Board Member/Alumnae – Leadership Long Beach Institute
- Former Board Member – YMCA (Long Beach Chapter)

Sheryl Montgomery
sherylsmontgomery@gmail.com

QUALIFICATIONS

- Experienced and certified Human Resources professional, filling liaison/business partner role in the areas of recruitment, selection, labor relations, classification and compensation, and leadership development to support executive management goals.
- Demonstrated ability to successfully develop and monitor departmental and city-wide budgets, conduct financial analysis, administer grant-funded programs, manage projects, and report findings and recommendations to executive staff and stakeholders.
- Exceptional interpersonal skills, demonstrating a commitment to quality, respect and service. Ability to work effectively with elected officials, executive management, professionals, contractors, sworn and civilian safety personnel, clerical staff, field personnel, and the general public.

EXPERIENCE

- | | |
|------------------------------|---|
| July 2023 –
Present | <p>Senior Consultant
Stafford HR Consulting</p> <ul style="list-style-type: none"> • Perform project management, establishing and managing internal deadlines to meet client goals. • Develop templates and rubrics to ensure quality control across deliverables. |
| July 2014 –
June 2023 | <p>Administrative Services Manager
Anaheim Fire & Rescue, Anaheim, CA</p> <ul style="list-style-type: none"> • Developed and monitored operating budget of \$90 million. • Managed recruitments, reclassifications, training, progressive discipline, and grievances for 55 civilian staff. • Performed financial analysis and program and project management for IT and in-house EMS programs; developed implementation plans and conducted audits. • Supervised administrative, customer service and support staff as well as technical consultants. |
| November 2002 –
July 2014 | <p>Administrative Services Manager, Sr. Administrative Analyst
Community Development Department, City of Anaheim, CA</p> |

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- Monitored and reported on compliance with AB26x and AB1484 for Redevelopment dissolution between Successor Agency, Oversight Board, legal counsel and Department of Finance including semi-annual preparation of Recognized Obligation Payment Schedule, Meet and Confer process, required audits and development of Long-Range Property Management Plan.
- Managed department-wide personnel activities: recruitments, reclassifications, training, progressive discipline, and grievances; conduct investigations related to reported misconduct or conflict of interest.
- Managed administrative, customer service and support staff.
- Conducted quality review of all department submissions of City Council agenda items, accident and injury prevention, OSHA reporting, responses to public records requests.
- Served as Hearing Officer; managed customer service, owner outreach, and ADA/LEP projects for the Anaheim Housing Authority.
- Served as internal training consultant to Human Resources Department: Developed and presented Career Coaching Academy, Field to Office, New Supervisor and Advancing Management programs.

October 1991 –
November 2002

- MANAGEMENT ANALYST II, BUDGET/FINANCIAL ANALYST**
Police, Finance and Public Works Departments, City of Whittier, CA
- Developed and monitored public safety budget for Whittier PD and Santa Fe Springs policing contract
 - Awarded and managed \$3.9 million Federal and State grants
 - Conducted program research and legislative analysis, reporting to executive management team, Police Chief and City Manager
 - Audited projected and proposed budgets with Department Heads prior to reviews with City Manager and elected officials.
 - Supervised information services, utilities billing, and budget support staff

EDUCATION & CERTIFICATIONS

IPMA-SCP, Public Sector Human Resources Association Senior Certified Professional
MPA, CSULB

B.A. Business Administration/Management Information Systems, CSUF