Finance Department Progress Report FY2023/24

Message from the Finance Department Director Peter Coletto

I'm greatly appreciative of the hard work of the Finance Equity Team in supporting the Department in accessing the diverse talent in Sacramento and ensuring Finance staff feels included and connected to the Department. As a support department, Finance facilitates the delivery of City services through budgeting, accounting for taxpayer dollars, procuring goods and services, providing payroll services, financing infrastructure, permitting businesses, and collecting the revenues that make City services possible. We accomplish this through our people – and it is critical that we are able to recruit, accessing the available talent across all Sacramento communities, and retain staff.

This past year, the Finance Equity Team built upon the Citywide Employee Satisfaction Survey to gauge Finance staff feelings regarding inclusion in and connection to the Department. While the results of the survey were largely positive, the Finance Equity Team identified some areas of improvement that we will focus on in the coming year. First, would like more resources for and more clarity about career development. In response, we will explore options for mentorship as well as other measures to support career growth. Also, some staff expressed concerns about bullying and conflict resolution. We are utilizing existing trainings and will work with our Human Resources team on other strategies to address this concern.

The Finance Department is extremely lucky to have such a talented and dedicated staff. My goal is to help support staff in pursuit of their career goals and strengthen the connection between staff and our department's mission.

Finance Department Equity Team

Since the Equity Teams convening with the Office of Diversity and Equity (ODE) May 31, 2024, and as we close out FY23/24, the Finance Core Equity Team has made significant strides. Notably, the team has developed an equity statement for the department, which is currently under review by the Finance Director, awaiting adoption.

This term also marked a key achievement with the successful administration of the Finance Satisfaction Survey to department staff. The survey results were reviewed by equity team members and shared with the Finance Director. Feedback highlighted that employees feel trusted to self-manage time and produce quality work. However, the survey also revealed areas for improvement, particularly in **team culture, communication, management support, career planning, and professional development**. To address these findings, results will be shared with management and staff once an approved communication plan for disseminating DEI-related information is in place.

For FY23/24, our primary objective aligned with **RGEAP Outcome #13**: the City of Sacramento demonstrates a commitment to investing in professional development, capacity building, and training to advance racial and gender equity among its workforce. Beyond this, the department has actively promoted DEI initiatives in recruitment, hiring, and employee transitions. This includes expanding job advertisement platforms to reach a wider audience, diversifying interview panels (by gender,

background, experience, and including internal and external members), and encouraging participation in DEI trainings offered by the City.

Looking ahead to FY24/25, we have identified a new objective: **RGEAP Outcome #10**—fostering employee career development while advancing racial and gender equity. While focusing on this goal, we remain committed to continuing progress toward achieving both goals, #10 and #13 and complete unfinished action items.

The Finance Equity Core Team has navigated numerous challenges, including leadership transitions, daily operational demands, and budgetary constraints. While these obstacles have caused delays in our DEI initiatives, they also reflect the team's resilience and determination. Moving forward, we are committed to more intentional efforts, leveraging necessary support to drive meaningful progress in FY24/25.

Below are our action items, many of which extend from the previous year, aligning with the objectives outlined above:

1. Create a brief survey for Finance staff to understand DEI objectives FY23/24 (Dept-wide equity goal) (Complete)

- Capacity Building Element: Knowledge and Skill Development
- Surveys gather insights into staff perspectives, enabling targeted DEI initiatives.
- Application: Strengthens organizational knowledge to design effective equity objectives.

2. Engage lunch and learns with department staff to build partnerships and collaborations FY23/24 (Dept-wide equity goal) (Incomplete)

- Capacity Building Element: Networking and Partnerships
- Facilitates collaboration and mutual learning among staff.
- Application: Builds a culture of shared understanding and collective action for DEI goals.

3. Hold the next department staff meeting at the Center for Sacramento History FY23/24 (Dept-wide equity goal) (Incomplete)

- Capacity Building Element: Awareness and Education
- Exposes staff to the city's history of racial inequities, fostering empathy and understanding.
- Application: Connects historical context to current equity goals, enhancing informed decision-making.

4. Share and discuss Finance Satisfaction Survey results FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Feedback and Accountability
- Sharing results fosters transparency and drives actionable change.
- Application: Informs leadership and staff about progress and areas needing improvement.

5. Administer Finance Satisfaction Survey annually FY24/25 (#10 and #13 RGEAP Objectives)

- Capacity Building Element: Sustainability
- Regular measurement ensures ongoing improvement and alignment with objectives.
- Application: Provides a consistent tool to evaluate and track DEI growth over time.

6. Create and display Finance Dept's Equity Statement/Commitment on department's website FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Institutional Development
- Formalizing an equity statement establishes a shared vision and commitment.
- Application: Signals department-wide dedication to DEI, fostering accountability.

7. Develop a communication plan for DEI efforts and seek approval FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Organizational Strategy
- Structured communication improves clarity and alignment on DEI initiatives.
- Application: Ensures DEI goals are effectively communicated and supported.

8. Complete the makeup of Finance's Core Equity Team FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Team Building
- A representative team ensures diverse perspectives in equity planning.
- Application: Strengthens collaboration and accountability within the department.

9. Coordinate immediate training on bullying and other management topics FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Training and Development
- Equips staff with skills to create an inclusive and respectful workplace.
- Application: Builds a safer and more equitable organizational culture.

10. Encourage 21-day Racial Habit Behavior Challenge; Require annual DEI training FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Continuous Education
- Promotes ongoing learning to combat biases and enhance DEI awareness.
- Application: Builds individual and organizational competency in advancing equity.

11. Develop strategies and timelines for deliverables FY24/25 (#10 and #13 RGEAP Outcomes)

- Capacity Building Element: Planning and Accountability
- Clear strategies and timelines ensure actionable progress toward goals.

- Application: Encourages systematic, measurable improvements in DEI efforts.

12. Administer a survey to division managers FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Needs Assessment
- Identifies gaps in managers' understanding of DEI objectives.
- Application: Tailors training and communication efforts for leadership.

13. Share RE Tools Glossary with staff FY24/25 (#10 and #13 RGEAP Outcomes)

- Capacity Building Element: Knowledge Sharing
- Provides a common language for discussing equity concepts.
- Application: Facilitates informed discussions and consistent understanding.

14. Develop and administer a Finance Mentorship Program FY24/25 (Dept-wide equity goal)

- Capacity Building Element: Talent Development
- Mentorship supports career growth and builds leadership capacity.
- Application: Fosters equity in opportunities for staff advancement.

15. Include a Racial Equity Impact Statement in staff reports (Dept-wide Equity goal)

- Capacity Building Element: Institutionalizing Equity
- Embeds equity considerations into decision-making processes.
- Application: Ensures DEI principles are consistently applied across projects.

16. Add DEI check-ins to divisional meeting agendas (Dept-wide Equity goal)

- Capacity Building Element: Continuous Improvement
- Regular discussions integrate equity into everyday operations.
- Application: Promotes accountability and keeps DEI goals top of mind.

17. Conduct staff stay and exit interviews (Dept-wide Equity goal)

- Capacity Building Element: Feedback and Data Collection
- Provides insights into workplace culture and areas for improvement.
- Application: Enhances retention and informs equity-focused changes.

18. Link management compensation to DEI performance (Dept-wide Equity goal)

- Capacity Building Element: Incentivization
- Aligns personal accountability with organizational equity goals.
- Application: Drives commitment to measurable DEI outcomes.

19. Create Finance Core Equity Team Newsletter (Dept-wide Equity goal)

- Capacity Building Element: Communication
- Keeps staff informed about DEI progress and initiatives.
- Application: Reinforces transparency and engagement.

20. Monitor turnover, promotions, and use the Budget Equity Tool (Dept-wide Equity goal)

- Capacity Building Element: Data and Metrics
- Tracking data highlights progress and areas needing attention.
- Application: Ensures equity goals are measurable and informed by evidence.

Finance Department Racial Equity Statement (new statement in review)

The Finance Department will continue to pursue transparency and fiscal responsibility to support the delivery of high-quality, accessible, and sustainable City services to ALL Sacramentans.

Outcome Statement, Action and Objectives	Status/Progress to Date	Performance Measures	Careholders	Successes
From the 14 Outcomes of the Race & Gender Equity Action Plan (RGEAP). Include any areas of the 43-Equity Point Assessment Roadmap Tool connected to this outcome, and any specific actions or objectives from the Outcome.	Share major steps your team has taken to move toward the stated objectives.	What indicators did you or will you use to measure success? (Quality and Quantity of Effort)		Provide a narrative of notable best practices and successes that have been achieved beyond just restating the performance measures achieved.
After our team completed the Assessment Roadmap tool our results shown Finance needs to focus on providing training to our leadership staff (Managers/Supervisors) for our first objective. #13 - City of Sacramento demonstrates a commitment to investing in professional development, capacity building, and training to advance racial and gender equity among the workforce.	Managers and supervisors were asked to take an online training "Advanced DEI with Agility" training course through Acumen which was completed 8/1/2022. Attendance records show 90% of Finance Management staff and sups took the training by 9/10/2022. The co-leads spent 3 days researching the right training "Advanced DEI with Agility" training. We worked closely with the Organizational Development team in the Human Resources Department on navigating Acumen and finding a DEI training for our managerial staff. This survey consists of the following categories: - Engagement - Fit & Belonging - Management - Psychological Safety - Self Efficacy - Team Culture/Learning and Work Relationship A Finance Satisfaction Survey was developed and administered to all of Finance staff in late FY23/24. Results were then shared with the director and subsequently shared with division managers. Results have not yet been shared with the remaining staff but the goal is to share before fiscal year end. Director requested a communicaiton plan be created. The goal for the Finance Equity Team is to administer the Satisfaction Survey annually (in June) to ensure ongoing improvement and alignment with objectives. This provides a consistent tool to evaluate and track DEI growth over time. The Finance Equity team developed its department's equity statement and presented to director on 6/12/2024; still currently under review. At the director's request, materials from CAO and CDD's Mentorship Progam and a Communication Plan were shared on 11/21/2024. This is a topic the Finance Director is passionate about developing for the Finance Department. A list of action items were developed to assist the Finance Equity Team in achieving our goals. These action items were shared with the Finance Director, which are still currently under review for approval.	**Percent** of managers and supervisors to complete the traingin: 90% **Number** of attendees at lunch and learns	Finance Managers, Finance employees, Executive Leadership	