

Alaska Legislative Report

Results of the Retiree Return Program enacted by
House Bill 161 in 2005 on

The Public Employees'
and
Teachers' Retirement System



Submitted by
State of Alaska
Department of Administration
Division of Retirement and Benefits
Division of Personnel
February 14, 2007

STATE OF ALASKA

SARAH PALIN, GOVERNOR

DEPARTMENT OF ADMINISTRATION

OFFICE OF THE COMMISSIONER

P.O. BOX 110200
JUNEAU, ALASKA 99811-0200
PHONE: (907) 465-2200
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February 14, 2007

The Honorable Lyda Green
Senate President
The Honorable John Harris
House Speaker
24th Alaska State Legislature
State Capitol
Juneau, Alaska 99801-1182

Dear Mr. President and Mr. Speaker:

In 2005, the Twenty-Fourth Legislature enacted House Bill 161 relating to reemployment of retired members of the Teachers' (TRS) and Public Employees' Retirement Systems (PERS) to address a shortage of qualified applicants for teaching and public employment throughout the State of Alaska. Section 12 of this legislation will repeal the Retiree Return Program effective July 1, 2009, unless extended by the Legislature.

In accordance with Section 13 of this legislation, the Department of Administration has prepared this report on the effect of this Act, as amended, on the retirement systems. This report is divided into two separate sections as outlined below:

- Section 1 includes information from the Division of Retirement and Benefits collected from the PERS and TRS employers and retirees participating in HB 161.
- Section 2 includes information from the Division of Personnel regarding the efforts by the State of Alaska to address recruitment difficulties experienced by the executive branch in specific job classes.

Please let me know if you have any questions about this report.

Sincerely,



Annette Kreitzer
Commissioner
Department of Administration

Section 1

Division of Retirement and Benefits

HB 161 Background

Section 1 of this report was prepared by the Division of Retirement and Benefits. It includes information collected from the PERS and TRS employers and retirees participating in House Bill 161 (HB 161). In 2001 the Twenty-First Legislature enacted HB 242. This bill amended the statutes to allow certain Public Employees' (PERS) and Teachers' Retirement System (TRS) members who retired with a normal retirement to return to work and continue to receive normal retirement benefits by waiving participation in the retirement systems. Once participation was waived, no contributions were required from the employer or the employee. The legislation included a sunset provision effective July 1, 2005. Prior to the passage of this legislation members who retired and then reemployed in a PERS or TRS participating position had their retirement benefit stopped during the period of reemployment. The member would then accrue an additional pension benefit for the second period of employment.

HB 161 was introduced on April 5, 2005. This legislation allows the rehire of certain PERS and TRS employees who retired with a normal retirement. These rehires can continue to receive normal retirement benefits by waiving further participation in the retirement systems. During the period of reemployment, no contributions to PERS and TRS are required from the employee. Several concerns were raised about the lack of "sideboards" for participation in HB 242. HB 161 included requirements for the State of Alaska and political subdivisions to conduct a minimum 30 day recruitment resulting in fewer than five qualified and available applicants, including the retiree, before a rehire under the program could occur. A knowledge transfer plan outlining the employer's plans to address the knowledge, skills, and abilities that need to be transferred or developed to assure the work can be accomplished when the reemployment provisions terminate must also be submitted to the Division of Retirement and Benefits.

Additionally, HB 161 addressed concerns regarding the affect of rehiring retirees under this program on the funding of the retirement systems by requiring employers to make contributions toward their unfunded liability for each rehired retiree. Retirees are also required to enroll in the employer's active health insurance plan upon reemployment under the waiver and their retirement health insurance benefits are suspended while reemployed.

HB 161 also addressed retirees who reemployed under the prior Retiree Rehire Program enacted in 2001 by HB 242/SB149. An attorney general opinion issued in 2004 regarding HB 242/SB 149, stated that retirees could not continue in employment without affecting their retirement benefits if they remained employed after the sunset date. HB 161 provides retirees who reemployed prior to November 3, 2004 an extension of participation in the program to December 31, 2006. After that date, continued employment in the program would be contingent on meeting the requirements and conditions of HB 161 as noted above.

Reporting

This section of the report comprises a summary of the waiver activity since the Retiree Return program under HB 161 became effective on July 1, 2005 to the last reporting period, December 31, 2006, for both the TRS and the PERS.

TRS Results

Since July 1, 2005, there are 18 out of 57 or 31.5% of TRS employers have participated and 25 waivers were filed with the Division of Retirement and Benefits. As of December 31, 2006, 18 out of 18 or 100% of participating employers have submitted a knowledge transfer plan. The largest number of retirees rehired within 40 or more months of their termination and retirement. The second largest number of returned retirees included those who had been retired for 24-36 months. The largest number of positions rehired was general teachers with the second highest being Special Education teachers. As of December 31, 2006, there were 59 TRS retirees who were originally rehired under HB 242 and have been rehired under HB 161.

Additional information regarding the employers participating in this program and how they have participated is found in the statistical section of this report.

PERS Results

Since July 1, 2005, there are 24 out of 160 or 15% of PERS employers participating in the program with a total of 69 waivers filed with the Division of Retirement and Benefits. As of December 31, 2006, the Division has received 19 out of 24 or 79% knowledge transfer plans.

The largest number of retirees rehired over 36 months from their termination and retirement. The second largest number of returned retirees includes those who had been retired for 1-6 months. Positions filled with rehired retirees were varied. As of December 31, 2006, there are 38 PERS retirees who were originally rehired under HB 242 and have been rehired under HB 161.

Additional information regarding the PERS employers participating in the program and detailed information regarding the type of positions rehired is included in the statistical section of this report.

Financial Impact on the PERS and TRS Systems

HB 161 requires employers to make payments of employer contributions sufficient to cover any unfunded liability created by the program. A copy of the rates is included in this report. Retirees who rehire under HB 161 have their retiree medical benefits suspended for the period of reemployment. Retirees who rehired under HB 242 prior to November 3, 2004 are required to participate in the employer's medical plan making the retiree health plan secondary coverage. Retirees that were rehired under HB 242 and were then rehired under HB 161 must enroll in the employer's active health plan and their retiree health coverage is suspended.

Reconciliation of PERS HB 242 Rehired Retirees

Status of HB 242 Rehired Retirees as of December 31, 2006

Total number of retirees continuing under HB 161 with waivers	36
Total number of retirees who terminated employment	2
Total number of retirees who rehired under the standard PERS rehire provision	<u>0</u>
Total	38

Analysis of Retiree Rehire Program - PERS (HB 161)

Summary

The following information summarizes the activity reported by employers to the Division of Retirement and Benefits from July 1, 2005 through December 31, 2006.

Total number of PERS employers	160
Total number of PERS employers participating in HB 161	24
Percentage of total PERS employers participating in HB 161	15%
Total number of PERS waivers received	69
Total number of PERS retirees employed under the waiver as of December 31, 2006	54
Total number of employers submitting a knowledge transfer plan	19

Job Classes Rehired Under PERS HB 161

Administrative Assistant	State of Alaska
Administrative Manager IV	State of Alaska
Analyst Programmer IV	State of Alaska
Assistant CMS Project Manager	State of Alaska
Assistant Commissioner	State of Alaska
Associate Coordinator	State of Alaska
Asst Supervisor/Business Coordinator	Bering Strait School District
Attorney V	State of Alaska
Attorney VI	State of Alaska
Biometrician III	State of Alaska
Children's Services Specialist II	State of Alaska
Fisheries Entry Commission Chairman	State of Alaska
Correctional Superintendent I	State of Alaska
Criminal Justice Planner	State of Alaska
Custodian	Ketchikan Gateway Borough School Dis.
Deputy Clerk III (2)	State of Alaska
Deputy Clerk IV	State of Alaska
Deputy Commissioner (2)	State of Alaska
Director (3)	State of Alaska
Economist III	State of Alaska
Engineer I	State of Alaska
Engineer IV	State of Alaska
Engineering Associate (2)	State of Alaska
Executive Administrator	State of Alaska
Executive Secretary (2)	State of Alaska
Facilities Manager	State of Alaska
Fisheries Biologist (3)	State of Alaska
Fisheries Scientist	State of Alaska
Fisheries Biologist III (3)	State of Alaska
Language Teacher (2)	Anchorage School District
Maintenance Specialist BFC Foreman	State of Alaska
Maintenance	Aleutian Region School District
Police Officer	Ketchikan Gateway Borough
Project Assistant	State of Alaska
Project Manager	Fairbanks North Star Borough
Quality Assurance Coordinator	Bartlett Regional Hospital
Regional Supervisor	State of Alaska
Research Analyst II	State of Alaska
Rural Court Training Asst.	State of Alaska
Safety and Security Coordinator	Matanuska-Susitna Borough
SE Region Director CM&O	State of Alaska
Special Assistant to the Commissioner	State of Alaska
Special Assistant/Legislative Liaison	State of Alaska
Special Projects Coordinator	State of Alaska
SR Assistant Attorney General	State of Alaska
State Trooper (2)	State of Alaska
Student Services Director	City of Palmer
Supervisor Bldg/Grounds	Ketchikan Gateway Borough SD
Vessel Supervisor	State of Alaska

Detail of number of PERS Retirees Rehired by Each Participating Employer for HB 161 from July 1, 2005 to December 31, 2006

<u>Employer</u>	<u>No. of Waivers</u>
Aleutian Region School District	1
Anchorage School District	2
Bartlett Hospital	1
Bering Straits School District	1
City of Palmer	1
Fairbanks North Star Borough	1
Ketchikan Gateway Borough	1
Ketchikan Gateway Borough School District	2
State of Alaska	59

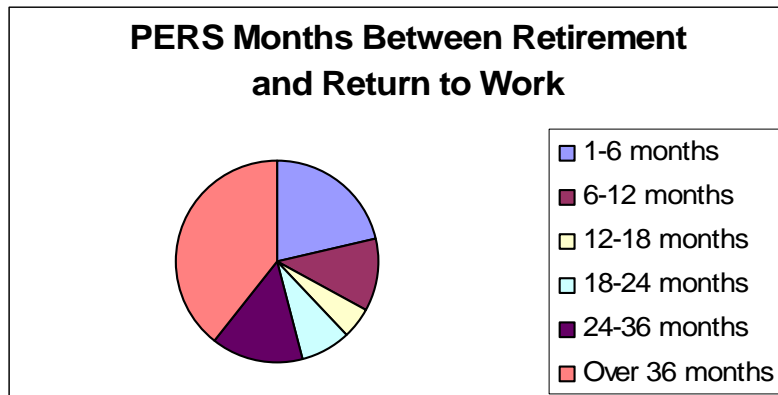
PERS Rehired Retiree Employer Rates for Fiscal Years FY07 and FY08

Employer Name	(Percentage) Employer Rate for FY 2007	Less: Consolidated Rate	Past Service Employer Rate for FY 2007
Alaska, State of	22.65	13.32	9.33
Alaska, State of -- Police and Fire members	23.42	13.32	10.10
Aleutian Region School District*	13.32	13.32	0
Anchorage SD	24.25	13.32	10.93
Bartlett Regional Hospital	17.20	13.32	3.88
Bering Straits School District	18.39	13.32	5.07
Fairbanks North Star Borough	20.93	13.32	7.61
Ketchikan Gateway Borough	20.49	13.32	7.17
Ketchikan Gateway Borough SD	20.86	13.32	7.54
Matanuska-Susitna Borough	20.99	13.32	7.67
Palmer, City of	24.74	13.32	10.22

Employer Name	(Percentage) Employer Rate for FY 2008	Less: Consolidated Rate	Past Service Employer Rate for FY 2008
Alaska, State of	43.83	14.48	29.35
Alaska, State of -- Police and Fire members	45.30	14.48	30.82
Aleutian Region School District*	14.48	14.48	0
Anchorage SD	33.27	14.48	18.79
Bartlett Regional Hospital	21.87	14.48	7.39
Bering Straits School District	21.61	14.48	7.13
Fairbanks North Star Borough	25.56	14.48	11.08
Ketchikan Gateway Borough	27.13	14.48	12.65
Ketchikan Gateway Borough SD	34.44	14.48	19.96
Matanuska-Susitna Borough	28.28	14.48	13.80
Palmer, City of	34.79	14.48	20.31

*This employer's assets exceed liabilities.

Number of Months Retired Before Rehired under HB 161



Employer

No. of Months Retired Before Rehire

Anchorage School District 2 rehires	465 months/478 months
Bartlett Regional Hospital	11 months
Bering Straits School District	37 months
City of Palmer	62 months
Fairbanks North Star Borough	7 months
Ketchikan Gateway Borough	47 months
Ketchikan Gateway Borough SD	46 months
Ketchikan Gateway Borough SD	6 months
Mat-Su Borough	19 months
State of Alaska	
4 rehires	1 month
9 rehires	2-6 months
4 rehires	6-9 months
3 rehires	9-18 months
4 rehires	18-24 months
26 rehires	Over 24 months

Analysis of Retiree Rehire Program - TRS (HB 161)

Summary

The following information summarizes the activity reported by employers to the Division of Retirement and Benefits from July 1, 2005 through December 31, 2005.

Total number of TRS employers	57
Total number of TRS employers participating in HB 161	18
Percentage of total TRS employers participating in HB 161	31.5%
Total number of TRS waivers received	25
Total number of employers submitting a knowledge transfer plan	18

Reconciliation of TRS HB 242 Rehired Retirees as of December 31, 2006**Status of HB 242 Rehired Retirees as of December 31, 2006**

Total number of retirees continuing under HB 161 with waivers	59
Total number of retirees who terminated employment	0
Total number of retirees who rehired under the standard	
PERS rehire provision	<u>0</u>
Total	59

Job Classes Rehired Under TRS HB 161

Job Class	Employer
Assistant Superintendent	Bering Strait SD
Certified Director	Matanuska-Susitna Borough SD
Counselor	Anchorage SD
Counselor	North Slope Borough SD
Counselor	Lower Kuskokwim SD
Director, Curriculum	Denali Borough SD
Director	Lower Kuskokwim SD
Director (3)	Bering Strait SD
Director, Personnel	Aleutian Region SD
Education Specialist	Lower Kuskokwim SD
Elementary Librarian	Ketchikan Gateway Borough SD
Health Lifestyle Specialist	Northwest Arctic Borough SD
Librarian	Petersburg City SD
Principal	Bering Strait SD
Psychologist	Anchorage SD
Resource Specialist	Matanuska-Susitna Borough SD
School Psychologist (2)	Anchorage SD
Site Administrator	Lower Kuskokwim SD
Site Administrator	Lower Kuskokwim SD
Site Administrator	Lower Kuskokwim SD
Special Education Dept. Chair	Anchorage SD
Speech Language Pathologist (2)	Anchorage SD
Speech Therapist (2)	Matanuska-Susitna Borough SD
Student Psychologist	Anchorage SD
Student Services Director	Juneau Borough SD
Superintendent	Valdez City SD
Superintendent	Bering Strait SD
Superintendent	Lower Kuskokwim SD
Superintendent	SE Island Borough SD
Superintendent	Aleutian Region SD
Teacher	Anchorage SD
Teacher	Ketchikan Gateway Borough SD
Teacher	Matanuska-Susitna Borough SD
Teacher	Pelican City SD
Teacher	Petersburg City SD
Teacher	Bering Strait SD
Teacher	Lake and Peninsula Borough SD
Teacher (23)	Lower Kuskokwim SD
Teacher, English	Ketchikan Gateway Borough SD
Teacher, Health Occupations	Anchorage SD
Teacher, Life Skills	Anchorage SD
Teacher, Resource	Matanuska-Susitna Borough SD
Teacher, Special Education	Dillingham city SD
Teacher	Juneau Borough SD
Teacher	Wrangell City SD
Teacher	NW Arctic Borough SD
Teacher (6)	Anchorage SD
Teacher, Vocational Education	Anchorage SD

Detail of number of Retirees rehired by Each Participating Employer

Employer	No. of Waivers
Aleutian Region SD	1
Anchorage School District	22
Bering Strait School District	7
Denali Borough SD	1
Dillingham SD	1
Juneau School District	2
Lower Kuskokwim SD	30
Matanuska-Susitna Borough SD	5
North Slope Borough SD	1
Northwest Arctic SD	2
Pelican SD	1
Petersburg SD	2
Valdez City Schools	1
Wrangell SD	1

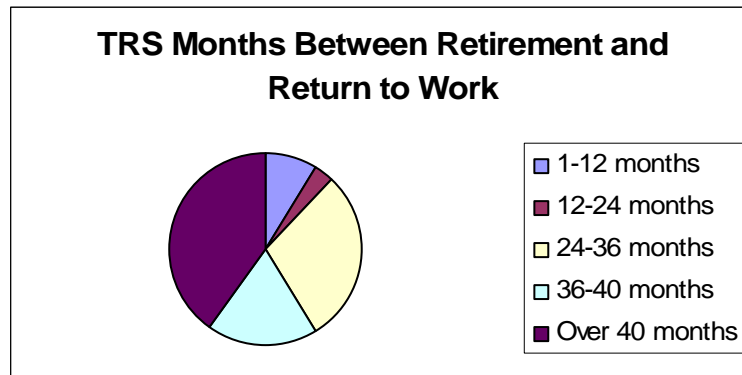
TRS Rehired Retiree Employer Rate for Fiscal Year 2007

Total employer contribution rate	41.78%
Less normal cost rate	<u>13.76%</u>
Rehired Retiree Rate	28.02%

TRS Rehired Retiree Employer Rate for Fiscal Year 2008

Total employer contribution rate	54.03
Less normal cost rate	<u>12.56</u>
Rehired Retiree Rate	41.47%

Number of Months Retired Before Rehired under HB 161



Employer

No. of Months Retired Before Rehire

Aleutian Region School District	116 months
Anchorage School District	
1 rehire	13 months
2 rehires	12 months-36 months
9 rehires	36 months-40 months
8 rehires	40 months-100 months
2 rehires	>100 months
Bering Straits School District 2 rehires	30 months/98 months
Denali School District	83 months
Dillingham City Schools	15 months
Juneau School District 2 rehires	13 months/74 months
Lake and Peninsula School District	139 months
Lower Kuskokwim School District	
3 rehires	0-12 months
9 rehires	25-30 months
7 rehires	30-50 months
11 rehires	51-123 months
Mat-Su Borough School District 2 rehires	28 months/76 months
North Slope School District	62 months
Northwest Arctic School District 2 rehires	86 months/98 months
Pelican City Schools	149 months
Petersburg School District 2 rehires	26 months/124 months
Southeast Island School District	27 months
Valdez City Schools	37 months
Wrangell City Schools	27 months

Section 2

Division of Personnel

Division of Personnel – Retiree Rehire, HB 161 Legislative Report

Section 2 of this legislative report was prepared by the Division of Personnel & Labor Relations. This section of the report is focused on the State of Alaska as the largest employer in the PERS system. It includes information on program activity and the efforts of the executive branch to address the recruitment difficulties in job classes in which retired members have been rehired.

House Bill (HB) 161 went into effect on July 1, 2005 and established three sunset dates for re-employed retirees, based upon the date of rehire. In extending the sunset dates of the retiree rehire program, the legislature intended to allow public employers the ability to continue to use this management tool while developing plans to address the knowledge, skills, and abilities that needed to be transferred or developed to assure work can be accomplished when HB 161 sunsets July, 1, 2009.

The first of three sunset dates established under HB 161 applied to retirees re-employed on or after November 3, 2004 and was reported on in the legislative report dated January 31, 2006.

The second sunset date established under HB 161 applied to retirees re-employed before November 3, 2004. This group of retirees was required to make a decision regarding continued employment by December 31, 2006. The following three options were available to them:

1. Continue employment in current position and discontinue receiving retirement payments.
2. Separate from service and continue to receive retirement payments.
3. Reapply for a state position (employment under a PERS waiver was contingent upon the criteria of the Retiree Rehire Policy being met).

As of January 1, 2007, 11 re-employed retirees who were subject to the sunset date of December 31, 2006, elected to remain employed in their current position and discontinue receiving retirement payments. Fifteen re-employed retirees were re-appointed through a competitive recruitment process in accordance with the Retiree Rehire Policy. The remaining retirees elected to separate from service and continue receiving retirement payments.

The third sunset date established by HB 161 applies to retirees re-employed on or after July 1, 2005. This group of retirees is eligible to remain employed under a PERS waiver through June 30, 2009. The table below denotes the number of retirees currently employed in the executive branch by agency.

Department*	DCCED	DMVA	DOC	EED	F&G	H&SS	Law	DPS	DOT/PF
Classified	0	0	1	1	11	3	1	3	4
Exempt/Partially Exempt	2	1	3	0	2	0	3	1	1

*The following departments do not currently employ re-employed retirees: Administration, Revenue, Labor & Workforce Development, Natural Resources, Environmental Conservation

To ensure consistent application of the retiree rehire program as intended by the legislature and in compliance with HB 161, the Department of Administration issued a Retiree Rehire Policy (Addendum A) which replaced Administrative Order 225. As with the Administrative Order, the Retiree Rehire Policy placed “side boards” on this program by providing certain criteria that must be met prior to the appointment of a retiree to a position within the classified service.

To make the most effective use of the retiree return program as a management tool, HB 161 requires the hiring authority to work with the Division of Personnel & Labor Relations to develop a plan that addresses efforts to reduce the recruitment difficulties in job classes in which retirees have been hired. The development plan addresses:

- the critical components of the position;
- the knowledge, skills, and abilities that need to be developed in the workplace to assure that the work can be accomplished when the rehired retiree leaves state service; and
- a development plan for accomplishing the transfer of knowledge.

The Division of Personnel & Labor Relations offers a presentation on developing knowledge transfer plans. The presentation addresses identifying the critical components of the job, the knowledge, skills and abilities required to perform the critical components of the job, conducting a skill gap analysis, and finally, developing the knowledge transfer plan. A knowledge transfer plan can be as simple as developing a desk manual for less complex positions, or as detailed as an intensive training program. The Division’s Management Services Section is available to provide guidance throughout the process.

To date, the Director of the Division of Personnel & Labor Relations has received and approved knowledge transfer plans for 20 of the 24 classified positions filled by an employee working under a PERS waiver in the retiree/return program. Two have received a waiver from the development of a plan due to the uniqueness of the positions and two are currently in the development phase. A knowledge transfer plan prepared jointly by the Department of Fish and Game and Division of Personnel & Labor Relations, Management Services section is included as Addendum B.

Additionally, the Division of Personnel & Labor Relations has established and filled a “professional recruiter” position which is tasked with marketing the State of Alaska as an employer of choice, researching and implementing best practices within the recruitment arena and partnering with departments to develop recruitment strategies for difficult to fill job classifications.

In an effort to mitigate future recruitment difficulties, the Division of Personnel & Labor Relations will continue to assist and encourage departments to develop strategic workforce plans to mitigate future recruitment difficulties.

Memorandum

Department of Administration
Office of the Commissioner

To: All Commissioners

Date: September 11, 2006

From: Scott J. Nordstrand
Commissioner

Phone: 465-5671

Subject: Retiree Rehire Policy – HB 242 / 161

This memo is intended to respond to questions that have arisen regarding the guidelines for employees who were or are rehired in accordance with House Bills 242 and 161. You may be aware that the extension of HB 242 which was introduced last session as HB 161 (retiree return program) generated some angst with several legislators. In order to address the concerns raised by legislators so that agencies could continue to offer this program as a management tool, Governor Murkowski adopted Administrative Order 225 in March of 2005.

Administrative Order 225 acted to place "side boards" on this program by providing certain criteria that must be met with the appointment of rehired retirees to positions in the classified service under HB 242. However, with the sunset of HB 242 and the passage of HB 161, Administrative Order 225 is no longer operative. Therefore, to ensure consistent application of the retiree rehire program as intended by the legislature and compliance with HB 161, this memo has been hereby formalized into policy as outlined below.

A retiree who intends to seek a PERS waiver may be appointed to a position in the classified service if:

- an open competitive recruitment process is conducted for at least 30 days and results in an applicant pool of fewer than five qualified, eligible, and available applicants;
- all qualified, eligible and available applicants are considered;
- the hiring authority demonstrates why no other applicant will have the knowledge, skills, or ability to perform the duties of the position after serving the full probationary period; and
- the retiree has served a thirty-day separation with the PERS. If the employee currently is covered under HB 242, a second thirty-day separation will not be required if the employee is later appointed under HB 161. However, if the employee has not been rehired under HB 242 and has not served the initial thirty-day separation, a thirty-day separation will be required.

Approval to hire a retiree who intends to seek a PERS waiver must be secured in writing from the Director of the Division of Personnel prior to an offer of employment. Within 60 days after receipt of the Director's approval and acceptance of the position by the retiree, the hiring authority shall work with the Division of Personnel to develop a plan that addresses:

Attachment A

All Commissioners

- 2 -

September 11, 2006

- the critical components of the position;
- the knowledge, skills, and abilities that need to be developed in the workplace to assure that the work can be accomplished when the rehired retiree leaves state service; and
- a development plan for accomplishing the transfer of knowledge.

Completed plans shall be submitted to the Director of the Division of Personnel for approval.

Questions regarding this policy may be addressed to your department's Division of Personnel, Management Services Consultant. Additional information on the application of this policy and HB 161 is available on the Division of Personnel's website.

cc: Traci Carpenter, Director
Division of Retirement and Benefits

Administrative Services Directors

Division of Personnel Staff

STATE OF ALASKA

Attachment B

Frank Murkowski, GOVERNOR

DEPARTMENT OF FISH AND GAME

DIVISION OF WILDLIFE CONSERVATION

P.O. BOX 25526
JUNEAU, AK 99802-5526
PHONE: (907) 465-4190
FAX: (907) 465-6142

MEMORANDUM

TO: Mila Cosgrove, Director Division of Personnel

THRU:

FROM: Gene Sandone, CF/ AYK Regional Supervisor

DATE: 3 October 2005

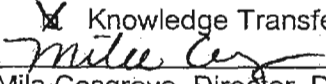
SUBJECT: Knowledge Transfer Plan for [REDACTED], Fishery Biologist IV

I am requesting approval for the knowledge transfer plan outlined in this memorandum. The knowledge transfer plan was developed in accordance with Administrative Order 225. [REDACTED] is working under a PERS waiver and he is the incumbent of a permanent fulltime position, PCN [REDACTED]. His first day of work was August 2, 2005. The 60 day deadline for the knowledge transfer plan is Tuesday, October 4, 2005.

Three primary development areas were identified through skill gap analysis using the Knowledge Transfer Worksheet. They are included in the knowledge transfer plan. The areas are:

1. Consultation on fisheries management and emergency orders,
2. Training and mentoring area biologist position in federal and state subsistence fisheries management issues and state liaison duties,
3. Train less experienced managers in regional review and coordination of Alaska Board of Fisheries staff comments on proposals and written and oral reports.

It is anticipated the knowledge transfer plan will take up to 24 months to complete and that some knowledge transfer will be ongoing as business practices and needs evolve. The majority of the knowledge transfer will be provided to four area management biologists in the AYK Region, [REDACTED], [REDACTED], [REDACTED] and [REDACTED], by [REDACTED]. Mr. [REDACTED], also a regional management supervisor for AYK Region, will assist in this plan. Providing knowledge transfer to Fishery Biologist I and IIs will also be a part of this plan to increase fishery management experience and depth. I will monitor the knowledge transfer on a monthly basis and make adjustments as needed on a quarterly basis to assure that staff are trained to take over the work when Mr. [REDACTED] separates from service. I will also report the plan's progress to my Management Services Consultant, Stacie Bentley, on a regular basis.

☒ Knowledge Transfer Plan Approved

Mila Cosgrove, Director, Division of Personnel

10/19/05
Date

Knowledge Transfer Plan

Development Area	Transfer Type	Recipient(s)	Target Completion Date	Successful Transfer Measurement
Consultation on fisheries management and emergency orders	Returned Retiree: [REDACTED] has the greatest cumulative knowledge and experience in herring and salmon management in the region (providing for subsistence priority, achieving escapement goals, allowing harvest of surplus, and stock status trends).	[REDACTED], [REDACTED], [REDACTED], and [REDACTED]	7/15/07 (24 months) NOTE: ongoing knowledge transfer process	Sharing this specialized knowledge will aid in the development of our next regional management supervisor.
	Job Rotation programs: [REDACTED] and [REDACTED] will implement a form of job rotation program as a training and experience tool for area and assistant area biologists in the region. Most area management biologists know a lot about a single area, but a regional management position should have boarder experience.	[REDACTED], [REDACTED], [REDACTED], and [REDACTED] [REDACTED], [REDACTED], [REDACTED], [REDACTED], and [REDACTED]	7/15/07 (24 months)	Sharing this specialized knowledge will aid in the development of our next regional management supervisor through supervisors and colleagues observing ability of area management staff to have working knowledge of fisheries in two or more areas within the region.
	Job aids: [REDACTED] will develop an inventory of example emergency orders for area management staff to increase efficiency in completing these documents and for consistency within the region.		7/15/06 (9months)	Completed inventory

Attachment B

Mentoring experience in state and federal subsistence policy issues.	Returned Retiree and Mentoring programs: [redacted] and [redacted] will directly mentor Yukon Area Management position in federal and state subsistence policy issues, role of state liaison position, and working with federal agency employees involved with subsistence fisheries management.	[redacted]	7/15/07 (24 months)	Supervisors observe ability of Yukon Area management biologist to: <ul style="list-style-type: none"> • Articulate knowledge of federal and state subsistence management issues to others • Work with federal agencies
	Critical incident reviews – [redacted] will discuss the outcomes of previous state and federal subsistence liaison events with the Yukon Area management biologist to aid in development as a state liaison. Specific examples are the events and results of previous and ongoing state and federal subsistence protocols and Federal Subsistence Board regulatory actions.	[redacted]	7/15/07 (24 months), ongoing	Supervisors observe ability of Yukon Area management biologist to: Apply knowledge appropriately to state liaison situations
Train less experienced managers in regional review and coordination of Alaska Board of Fisheries	Returned Retirees and Job Shadowing programs: [redacted] will work closely with area managers to develop broader experience in Board of Fisheries preparation. During the next Board	[redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted]	Ongoing 7/15/07 (24 months)	Supervisors and colleagues observe ability of area management staff to: have working knowledge of fisheries in two or more areas within the region. Participate as productive staff members at Board of Fisheries

Attachment B

staff comments on proposals and written and oral reports.	of Fisheries cycle, one area biologist will be selected to assist Boards Section and other division staff to complete the proposal road map, assign proposals to staff for comments, review comments and coordinate review by other divisions. All area biologists will be assigned to review and comment on staff written reports for other areas of the region. Assistant area management biologists for each area will be assigned to provide staff comments at the board meeting for a selected number of proposals. Select assistant area biologists may be assigned oral reports to the board to gain more experience and depth.	██████ and ████████		meeting. Coordinate area staff development of proposal comments and written and oral reports.