



John Barrientos, Director of Compliance (DOC), and Greg Fedak, Compliance Analyst, for the Cook County Assessor's Office (AO), respectfully submit this Semi-Annual Report pursuant to Section V(B) of the [Employment Plan](#). As required, this Semi-Annual report will also be posted and made publicly available on the AO's [website](#).

I. Introduction

This Semi-Annual Report covers compliance activities at the AO from March 1, 2025, through August 31, 2025. The DOC's role is to ensure compliance with the Employment Plan and Employee Handbook and to prevent Unlawful Political Discrimination from occurring in any employment actions or practices, except as permitted for exempt positions.¹

Some activity occurred in 17 hiring sequences for *Shakman*-covered positions during this reporting period, including hiring for other *Shakman*-exempt positions. Under the current administration, there have been no findings of unlawful political discrimination. The DOC is conducting two investigations related to possible Plan violations. Reports for these investigations are currently being drafted, and the findings will be reported on the next semi-annual report. Finally, there have been no reports by the OIIG involving AO staff in conjunction with any *Shakman*-related allegations.

II. Reporting and Collaboration

A. Periodic Reports and Standing Meetings

The DOC submits periodic reports to the Assessor and key personnel at the AO outlining compliance activities, recommendations, and corrective action suggestions based on monitoring activities. Additionally, the reports highlight staff efforts to work collaboratively with the DOC. The concerns raised in these reports involve technical, rather than substantive, violations and do not pose a risk of unlawful political considerations.

Various standing meetings are held between the DOC, Assessor, Deputy Assessor, and the Deputies of HR and Legal to address any compliance concerns or initiatives related to the Employment Plan and Handbook. Revisions to the Handbook are underway and pending union review. The DOC has resumed regular meetings with Supervisors to collaborate and discuss various compliance topics that may warrant attention, respond to questions, and provide an opportunity for HR to provide guidance on these topics as well.

¹Monitoring activities were completed by the DOC and the Compliance Analyst during this reporting period.



B. Hiring Status

Human Resources ("HR") is composed of 6 Senior HR Generalists, a Director of Human Resources, and a Director of Recruitment who fulfills duties in the hiring and onboarding processes. HR also has a Director of Learning and Development who complements the hiring process with training programs, as well as additional HR staff to assist with all these duties. This staff performs work related to hiring sequences, onboarding, discipline-related investigations, and other tasks. The Generalists provide an opportunity for more simultaneous hiring sequences to be conducted, as reflected by the number of hiring sequences active during this reporting period. Intake Meetings are more streamlined and provide an opportunity to discuss the minimum and preferred qualifications outlined in the position descriptions, as well as interview questions and scheduling. Familiarity with the hiring processes among all staff leads to efficient discussions of key topics during a final check between HR and the hiring department, providing an opportunity to better manage expectations throughout the process.

C. Performance Management

The 2025 annual performance evaluation cycle will commence on September 1, 2025, and conclude through December 2025. The app remains a valuable tool for completing this process, as well as the 90- and 180-day evaluations; updates to the program continue to provide operational benefits. Continuing to have refresher training for evaluations has proven beneficial, as there are always staff members new to the Supervisory role. This provides an opportunity for discussion and feedback, aiming to ensure a smooth process, timely completion, and minimal technical errors. HR's responsibility for front-line procedural performance, as well as departmental performance, continues to demonstrate the benefits of office-wide preparation in the upcoming cycle.

III. Role of the DOC

The DOC's primary responsibilities are outlined in Article V of the Employment Plan and are fulfilled by meeting with the Assessor and key staff to discuss each of these duties as appropriate. The high-level responsibilities include, but are not limited to, the following categories:

- A. *Understanding the Assessor's Office's organization, its business, operational objectives and needs, and its staffing needs.*
- B. *Overseeing Compliance with Employee Handbook Policies*, with main topics including:
 - 1. Handbook Revisions – this task is ongoing.
 - 2. Time and Attendance – This is included in the revised Handbook.
 - 3. Discipline—enhanced processes outlined in the Handbook are designed to facilitate more



efficient operations. Of the disciplinary matters, no compliance concerns were raised.

4. Notices of Employment Action – timely receipt of documentation of employment actions.
 5. Grievances – monitored by DOC as appropriate and raised no compliance concerns.
- C. *Actively working with the Deputy of HR in developing strategies for the Employment Plan, as well as necessary Policies and Procedures to ensure compliance with the Plan.*
1. In collaboration with Learning and Development, the DOC is updating its interviewer training to replace the previous, lengthy module with a more streamlined version. The goal is to complete the new module soon, enabling both new and current employees to receive consistent training. This updated module will ensure interviewers are familiar with the Employment Plan and Handbook guidelines, supporting compliance throughout the hiring process.
- D. *Accepting, Investigating, and reporting on complaints related to the Employment Plan.*
- Two investigations were initiated by the DOC involving allegations of potential Plan violations during this reporting period. These investigations are currently in progress, and the findings will be reported during the next reporting period.
- E. *Reviewing Position Descriptions and Notices of Job Opportunities and taking appropriate steps to ensure their accuracy.*
1. Position Descriptions reflect greater consistencies across the AO related to salary and minimum/preferred qualifications.
 2. HR can provide additional guidance to Deputies, particularly those new to their role, to ensure this process brings about hiring efficiencies, improved validation, and office-wide consistency before presenting them for review by the DOC.
- F. *Working with HR to implement training programs, prepare training materials, and conduct training for all employees on the Employment Plan and other policies.*
1. Updated Plan training occurred during this reporting period, and no substantial compliance concerns were noted.
 2. Reporting on training activities remains timely.



G. Making recommendations to the Assessor and Department heads to eliminate and remedy instances of noncompliance with the Employment Plan and to prevent Unlawful Political Discrimination or Unlawful Political Contact.

During this reporting period, none of the issues that came to the DOC's attention or that were reported by the DOC rose to the level of unlawful political discrimination or unlawful political contact. The standard for compliance is not perfect but rather constitutionally adequate, and the AO continues to meet that standard. The DOC provides guidance on improving compliance with the Plan and Handbook for AO staff in various employment actions.

H. Monitoring activities pertaining to the employment of Shakman covered positions, including but not limited to participating in validation, interviews, and candidate selection meetings.

1. General Hiring Process

The DOC monitored activity in 12 General Hiring processes, some of which began during the last reporting period or involved the selection of additional Candidates from the Ranking List or the Validated Eligibility List for interviews. In addition, there was one actively recruited hiring process, and four Shakman-exempt positions were reviewed as directed by the Plan. In support of this activity, the DOC monitored over 200 interviews, reviewed the tabulation score sheets, and attended the Ranking Meetings. Several other hiring sequences involved offers to Candidates from the Ranking List. On average, hiring sequences were completed around 90 days from the job posting to the Candidate's onboarding date. Challenges related to hiring sequences highlight the need to carefully balance the obligations under the CBA alongside those under the Employment Plan. None of the comments in this report gives rise to Shakman-level concerns; instead, they reflect technical issues for which staff need to be alert, most notably in applying information from the Intake Meeting regarding the Minimum Qualifications (MQs) to the validation process. Improvements in this regard have been noted during the validation meetings between HR and the DOC, as evidenced by fewer instances where they reach different conclusions regarding MQs and PQs when reviewing submittals separately.

a. Junior Network Administrator

- i. Posting Closing Date: March 3, 2025
- ii. Hiring Date: May 5, 2025
- iii. Compliance Notes: No notable Plan compliance issues.

b. Taxpayer Information Specialist II:

- i. Posting Closing Date: March 5, 2024 (hiring used the previous Validated Eligibility List) & March 30, 2025
- ii. Hiring Date: March 2025 (from the March 2024 eligibility list) and September 8,



2025 (from the March 2025 eligibility list)
Compliance Notes: No notable compliance issues

c. Industrial Commercial Field Inspector III

- i. Posting Closing Date: April 29, 2025
- ii. Hiring Date: July 14, 2025
- iii. Compliance Notes: No notable Plan compliance issues.

d. Division Analyst I

- i. Posting Closing April 29, 2025
- ii. Hiring Date: Projected Hire Date in September 2025
- iii. Compliance Notes: The DOC initiated an investigation regarding a possible Employment Plan violation. The results of the investigation are pending.

e. Industrial Commercial Junior Analyst III

- i. Posting Closing Date: June 16, 2025
- ii. Hiring Date: Projected Hire Date in September 2025
- iii. Compliance Notes: Hiring Sequence in Process.

f. Exempt Analyst III

- i. Posting Closing Date: May 25, 2025
- ii. Hiring Date: Projected Hire Date in September 2025
- iii. Compliance Notes: Hiring Sequence in Process.

g. Industrial Commercial Valuations Group Leader III

- i. Posting Closing Date: June 23, 2025
- ii. Hiring Date: Projected Hire Date in September 2025
- iii. Compliance Notes: Hiring Sequence in Process.

h. Assessment Interventions Analyst

- i. Posting Closing Date: June 23, 2025
- ii. Hiring Date: Projected Hire Date in September 2025
- iii. Compliance Notes: Hiring Sequence in Process.



i. Residential Field Inspector III

- i. Posting Closing Date: August 23, 2025
- ii. Hiring Date: Hiring Sequence in Process
- iii. Compliance Notes: Hiring Sequence in Process.

j. Programmer I

- i. Posting Closing Date: September 1, 2025
- ii. Hiring Date: Hiring Sequence in Process
- iii. Compliance Hiring Sequence in Process.

k. Research Senior Analyst I

- i. Posting Closing Date: August 25, 2025
- ii. Hiring Date: Hiring Sequence in Process
- iii. Compliance Notes: Hiring Sequence in Process.

l. Technical Review Industrial & Commercial Analyst III

- i. Posting Closing Date: August 27, 2025
- ii. Hiring Date: Hiring Sequence in Process
- iii. Compliance Notes: Hiring Sequence in Process.

2. Actively Recruited positions:

a. Manager of Commercial Valuations

- i. Posting Closing Date: May 19, 2025
- ii. Hiring Date: No Candidate Selected. Position will be Reposted
- iii. Compliance Notes: The DOC initiated an investigation regarding a possible Employment Plan violation. The results of the investigation are pending.

3. Exempt Hiring

Exempt positions and links to the position descriptions are maintained on the CCAO's website. The DOC reviews the resume and position descriptions to ensure the individual meets the minimum qualifications. Four exempt positions were filled during this reporting period with no substantial compliance



concerns:

- a) Director of Valuations Research Hire (March 10, 2025)
- b) Director of Data Integrity Valuations Hire (March 10, 2025)
- c) Director of Appeals Hire (March 24, 2025)
- d) Special Assistant to the Assessor (March 24, 2025) (Reclassification)

IV. Requirements of this Semi-annual Report.

Section V(B) of the Employment Plan requires that this semi-annual report include consideration of the following: (i) auditing activities as required by the Plan; (ii) discovered violations of the Employment Plan or policies in the Employee Handbook referenced in this Plan; (iii) complaints of Unlawful Political Considerations in Employment Actions referred to the OIIG; (iv) remedial actions recommended; and (v) corrective actions taken by the Assessor's Office to address the violations.

A. Auditing activities

The DOC is focused on monitoring real-time activities rather than auditing during this period. Overtime is audited on a bi-weekly basis and is substantially compliant. Additional staffing is expected to reduce overtime needs. Time and attendance are periodically reviewed, and any concerns raised are addressed and resolved. It is anticipated that the same real-time monitoring will continue, but with revisions to the Handbook, auditing for Time and Attendance, as well as Overtime, will likely be implemented.

B. Discovered violations of the Employment Plan

There have been no substantiated complaints of unlawful political discrimination during this reporting period. Efficiencies and improvements continue throughout the AO. The DOC remains an active monitor and identifies compliance issues; none of these have amounted to constitutional violations during this reporting period.

The probationary evaluations (90- and 180-day) were largely completed in a timely manner, except in rare circumstances where questions or time off arose, requiring permission for the early issuance of the evaluation. Continued attention to this area is necessary to maintain an understanding of the importance of timeliness in this process.

The quality of disciplinary processes, investigations, and the imposition of discipline is generally compliant. Completion times for investigations have been reduced for the most part. This has also been reduced with the addition of another HR Generalist. However, some investigations took longer to complete based on the nature of the allegations and resources.

C. Complaints of UPD referred to the OIIG

Compliance or HR did not make any referrals to the OIIG during this reporting period.

D. Remedial Actions Recommended

Recommendations continue to be discussed when noted and implemented as appropriate.



E. *Corrective actions taken*

There were no significant remedial recommendations. Therefore, no specific corrective actions were reported.

Conclusion

The issues noted in this report do not rise to the level of unlawful political discrimination, which continues to show the Assessor's and office leadership's commitment to *Shakman* principles. There remains room for improvement in communication, as well as from a technical perspective, and the DOC continues to work with staff to streamline processes for enhanced accuracy and efficiency. This is continuously improved through open dialogue with the DOC and the Compliance Analyst, providing an opportunity to listen, discuss, and implement agreed-upon recommendations. This demonstrates a professional and effective working relationship within the CCAO, ensuring compliance with the Assessor's Employment Plan and Employee Handbook.

Respectfully submitted,

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Cook County Assessor's Office