

February 21, 2024

# CLASSIFICATION STUDY FINAL REPORT

City of Menifee



**Gallagher**

Insurance | Risk Management | Consulting

Formerly Koff & Associates



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Insurance | Risk Management | Consulting

February 21, 2024

Jonathan Nicks  
Deputy City Manager  
City of Menifee  
29844 Haun Rd.  
Menifee, CA 92586

Dear Mr. Nicks:

Gallagher is pleased to present the final classification report for the study of all positions in the City of Menifee. This report documents the classification study process and provides recommendations for the classification plan, allocations of individual positions for all City employees, and class specifications.

This report incorporates a summary of the study's multi-step process, which included results of written Position Description Questionnaires, interviews with employees and management, and management review and comments in the form of draft class descriptions, and class allocation recommendations.

We would like to thank you for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with you and we look forward to future opportunities to provide you with professional assistance.

Sincerely,

Kari Mercer  
Project Manager



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## Executive Summary

### Background

The City of Menifee (City) contracted with Gallagher (formerly Koff & Associates) to conduct a classification and total compensation study for all of the City's classifications. All classification findings, recommendations, and options for implementations are included in this report. Compensation study findings and recommendations will be provided under separate cover.

This classification review process was precipitated by:

- The concern of City Council, management, and the employee groups that employees should be recognized for the level and scope of work performed and that they are paid on a fair and competitive basis that allows the City to recruit and retain a high-quality staff;
- To ensure that class descriptions reflect current programs, responsibilities, and technology;
- The desire to have a compensation plan that can meet the needs of the City; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across the City.

The goal of the classification and compensation study is to assist the City in developing a competitive pay and benefit structure, which is based upon market data to ensure that the plan is fiscally responsible, and that meets the needs of the City with regards to recruitment and retention of qualified staff.

### Classification Study Goals

The goals and objectives of the classification portion of the study were to:

- Obtain detailed information regarding each position through a variety of techniques, including written Position Description Questionnaires (PDQs) and interviews with employees and management;
- Prepare an updated classification plan, including recommended class descriptions and position allocations that recognizes the scope and level of the various classes and positions, and is perceived equitable by management and employees alike;
- Provide class descriptions and other documentation that includes information required for compliance with the Americans with Disabilities Act (ADA) and appropriate qualifications, including knowledge, skills, and other requirements that are job-related and meet other legal guidelines; and
- Provide sufficient documentation to allow the City to maintain the classification system on a regular basis.

### Classification Study Process

The classification study procedures were as follows:

- An initial meeting was held with City management to clarify study scope, objectives, processes, and deliverables.
- Orientation meetings were held to which all employees were invited, to meet consultant staff involved with the project, clarify study objectives and procedures, answer questions, and distribute the PDQs.

- After the PDQs were completed by employees and reviewed by management and consultant staff, interviews were conducted with employees who requested to be interviewed and supervisors/managers. We received a total of 98 PDQs, and we scheduled 49 interviews.
- Following the analysis of the classification information gathered, draft class concepts, specifications, and position allocations were developed for management and employee review.
- After resolution of issues, wherever possible, including additional contacts with employees and management to gain details and clarification, appropriate modifications were made to the draft specifications and allocations and this final report was prepared.

## Classification Concepts

### Positions vs. Classifications

“Position” and “Classification” are two terms that are often used interchangeably but have very different meanings. As used in this report:

- A position is an assigned group of duties and responsibilities performed by one person. A position can be full-time, part-time, regular or temporary, filled or vacant. Often the word “job” is used in place of the word “position.”
- A classification or class may contain only one position or may consist of a number of positions. When you have several positions assigned to one class, it means that the same title is appropriate for each position; that the scope, level, duties, and responsibilities of each position assigned to the class are sufficiently similar (but not identical) that the same core knowledge, skills, abilities, and other requirements are appropriate for all positions, and that the same salary range is equitable for all positions in the class.

The description of a position often appears as a working desk manual, going into detail regarding work process steps, while a class description emphasizes the general scope and level of responsibilities, plus the knowledge, skills, abilities, and other requirements for successful performance

When positions are classified, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are thus evaluated and classified on the basis of such factors as knowledge, skills, and abilities required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), and the impact of the position on the organization and working conditions.

### The Relationship Between Classification and Compensation

Classification and the description of the work and the requirements to perform the work are separate and distinct from determining the worth of that work in the labor market and to the organization. While recommending the appropriate compensation for the work of a class depends upon an understanding of what that work is and what it requires (as noted above), compensation levels are often influenced by two factors:

- The external labor market; and
- Internal relationships within the organization.

Compensation findings and recommendations for the City will be provided under separate cover in the Compensation Study Final Report.



## The Purpose of Having a Classification Plan

A position classification plan provides an appropriate basis for making a variety of human resources decisions such as the:

- Development of job-related recruitment and selection procedures;
- Clear and objective appraisal of employee performance;
- Development of training plans and succession planning;
- Design of an equitable and competitive salary structure;
- Organizational development and the management of change; and
- Provision of an equitable basis for discipline and other employee actions.

In addition to providing this basis for various human resources management and process decisions, a position classification plan can also effectively support systems of administrative and fiscal control. Grouping of positions into an orderly classification system supports planning, budget analysis and preparation, and various other administrative functions.

Within a position classification plan, job classifications can either be broad (containing a number of positions) or narrow (emphasizing individual job characteristics). Broad job classifications are indicated when:

- Employees can be hired with a broad spectrum of knowledge, skill, and/or academic preparation and can readily learn the details of the City, the department, and the position on-the-job; or
- There is a need for flexibility of the assignment within a department or an organization due to changing programs, technologies, or workload.

Individualized job classifications are indicated when:

- There is an immediate need to recruit for specialty knowledge and skills;
- There is a minimum of time or capability for on-the-job training; or
- There is an organizational need to provide for specific job recognition and to highlight the differences between jobs.

Most classification plans are a combination of these two sets of factors and we have chosen the middle ground in this study as being most practicable in the City's changing environment and service delivery expectations, as well as being in line with the City's strategic plan. This approach resulted in recommendations to retitle classifications to more accurately reflect current responsibilities or use more contemporary titles (e.g. Park/Landscape Maintenance Attendant to Maintenance Assistant), or to reclassify certain individuals into existing or entirely new classifications that more accurately reflect current responsibilities (e.g. Information Technology Analyst to Systems Administrator).

## Classification Descriptions

In developing the new and revised classification descriptions for all positions, the basic concepts outlined in the previous pages were utilized. The recommended class descriptions have been provided to the City.

As mentioned earlier, the class descriptions are based upon the information from the written PDQs completed by each employee, the individual job audit interviews (if required), and from information provided by employees and managers during the review processes. These descriptions provide:



- A written summary documenting the work performed and/or proposed by the incumbents of these classifications;
- Distinctions among the classes; and
- Documentation of requirements and qualifications to assist in the recruitment and selection process.

Just as there is a difference between a position and a class, there is also a difference between a position description and a class description. A position description, often known as a “desk manual”, generally lists each duty an employee performs and may also have information about how to perform that duty. A class description normally reflects several positions and is a summary document that does not list each duty performed by every employee. The class description, which is intended to be broader, more general and informational, is intended to indicate the general scope and level of responsibility and requirements of the class, not detail-specific position responsibilities.

The sections of each class description are as follows:

**Title:** This should be brief and descriptive of the class and consistent with other titles in the classification plan and the occupational area.

- The title of a classification is normally used for organization, classification, and compensation purposes within the City. Often working titles are used within a department to differentiate an individual. All positions have a similar level of scope and responsibility; however, the working titles may give assurance to a member of the public that they are dealing with an appropriate individual. Working titles should be authorized by Human Resources to ensure consistency within the City and across departmental lines.

**Definition:** This provides a capsule description of the job and should give an indication of the type of supervision received the scope and level of the work and any unusual or unique factors. The phrase “performs related work as required” is not meant to unfairly expand the scope of the work performed, but to acknowledge that jobs change and that not all duties are included in the class specification.

**Supervision Received and Exercised:** This section specifies which class or classes provide supervision to the class being described and the type and level of work direction or supervision provided to this class. The section also specifies what type and level of work direction or supervision the class provides to other classes. This assists the reader in defining where the class “fits” in the organization and alludes to possible career advancement opportunities.

**Class Characteristics:** This can be considered the “editorial” section of the specification, slightly expanding the Definition, clarifying the most important aspects of the class and distinguishing this class from the next higher-level in a class series or from a similar class in a different occupational series.

**Examples of Typical Job Functions:** This section provides a list of the major and typical duties, intended to define the scope and level of the class and to support the Qualifications, including Knowledge and Skills. This list is meant to be illustrative only. It should be emphasized that the description is a summary document, and that duties change depending upon program requirements, technology, and organizational needs.

**Qualifications:** This element of the description has several sections:

- A listing of the job-related knowledge and skills required to successfully perform the work. They must be related to the duties and responsibilities of the work and capable of being validated under the Equal Employment Opportunity Commission’s Uniform Guidelines on Selection Procedures. Knowledge (intellectual comprehension) and Abilities (acquired proficiency) should be sufficiently detailed to provide the basis for selection of qualified employees.

- A listing of educational and experience requirements that outline minimum and alternative ways of gaining the knowledge and abilities required for entrance into the selection process. These elements are used as the basic screening technique for job applicants.
- Licenses and/or certifications identify those specifically required in order to perform the work. These certifications are often required by an agency higher than the City (i.e., the State), and can therefore be appropriately included as requirements.

**Physical Demands:** This section identifies the basic physical abilities required for performance of the work. These are not presented in great detail (although they are more specifically covered for documentation purposes in the PDQs) but are designed to indicate the type of pre-employment physical examination (lifting requirements and other unusual characteristics are included, such as “finger dexterity needed to access, enter, and retrieve data using a computer keyboard”) and to provide an initial basis for determining reasonable accommodation for ADA purposes.

**Working Conditions:** These can describe certain outside influences and circumstances under which a job is performed; they give employees or job applicants an idea of certain risks involved in the job and what type of protective gear may be necessary to perform the job. Examples are loud noise levels, cold and/or hot temperatures, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, and other job conditions.

## Fair Labor Standards Act

One of the major components of the job analysis and classification review is the determination of each classification’s appropriate Fair Labor Standards Act (FLSA) status, i.e., exempt vs. non-exempt from the FLSA overtime rules and regulations.

As we review position description questionnaires and notes from the interviews, we analyze each classification’s essential functions to determine FLSA status. There are three levels for the determination of the appropriate FLSA status that are utilized and on which we base our recommendations. Below are the steps used for the determination of Exempt FLSA status.

**Salary Basis Test:** The incumbents in a classification are paid at least \$684 per week (\$35,568 per year), not subject to reduction due to variations in quantity/quality of work performed.

**Exemption Applicability:** The incumbents in a classification perform any of the following types of jobs:

- **Executive:** Employee whose primary duty is to manage the business or a recognized department/entity and who customarily directs the work of two or more employees. This also includes individuals who hire, fire, or make recommendations that carry particular weight regarding employment status. Examples: executive, director, owner, manager, supervisor.
- **Administrative:** Employee whose primary activities are performing office work or non-manual work on matters of significance relating to the management or business operations of the firm or its customers and which require the exercise of discretion and independent judgment. Examples: coordinator, administrator, analyst, accountant.
- **Professional:** Employee who primarily performs work requiring advanced knowledge/education and which includes consistent exercise of discretion and independent judgment. The advanced knowledge must be in a field of science or learning acquired in a prolonged course of specialized intellectual instruction. Examples: attorney, physician, statistician, architect, biologist, pharmacist, engineer, teacher.
- **Computer professional:** Employee who primarily performs work as a computer systems analyst, programmer, software engineer or similarly skilled work in the computer field performing a) application of systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system



functional specifications; b) design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specification; or c) design, documentation, testing, creation or modification of computer programs based on and related to user or system design specifications; or a combination of the duties described above, the performance of which requires the same level of skills. Examples: system analyst, database analyst, network architect, software engineer, programmer.

**Job Analysis:** A thorough job analysis of the job duties must be performed to determine exempt status. An exempt position must pass both the salary basis and duties tests. The job analysis should include:

- Review of the minimum qualifications established for the job;
- Review of prior class descriptions, questionnaires, and related documentation;
- Confirmation of duty accuracy with management; and
- Review and analysis of workflow, organizational relationships, policies, and other available organizational data.

Non-exempt classifications work within detailed and well-defined sets of rules and regulations, policies, procedures, and practices that must be followed when making decisions. Although the knowledge base required to perform the work may be significant, the framework within which incumbents work is fairly restrictive and finite. (Please note that FLSA does not allow for the consideration of workload and scheduling when it comes to exemption status).

Finally, often a classification performs both non-exempt and exempt duties, so we analyze time spent on each type of duties. If a classification performs mostly non-exempt duties (i.e. more than 50% of his or her time), then the classification would be considered non-exempt.

## Classification Findings and Recommendations

### Classification Structure and Allocation Factors

The proposed classification plan provides the City with a systematic classification structure based on the interrelationship between duties performed, the nature and level of responsibilities, and other work-related requirements of the jobs.

A classification plan is not a stable, unchanging entity. Classification plans may be updated and revised by conducting classification studies that are organizational wide (review of the all classifications and positions) or position-specific. The methodology used for both types of studies is the same, as outlined above.

For either type of study, when identifying appropriate placement of new and/or realigned positions within the classification structure, there are general allocation factors to consider. By analyzing these factors, the City will be able to change and grow the organization while maintaining the classification plan.

#### 1. Type and Level of Knowledge and Skill Required

This factor defines the level of job knowledge and skill, including those attained by formal education, technical training, on-the job experience, and required certification or professional registration. The varying levels are as follows:



## **A. The entry-level into any occupational field**

This entry-level knowledge may be attained by obtaining a high school diploma, completing specific technical course work, or obtaining a four-year or advanced college or university degree. Little to no experience is required.

## **B. The experienced or journey-level (fully competent-level) in any occupational field**

This knowledge and skill level recognizes a class that is expected to perform the day-to-day functions of the work independently, but with guidelines (written or oral) and supervisory assistance available. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee or an assistant when functioning in a lead capacity. Certifications may be required for demonstrating possession of the required knowledge and skills.

## **C. The advanced level in any occupational field**

This knowledge and skill level is applied in situations where an employee is required to perform or deal with virtually any job situation that may be encountered. Guidelines may be limited and creative problem solving may be involved. Supervisory knowledge and skills are considered in a separate factor and should not influence any assessment of this factor.

## **2. Supervisory/Management Responsibility**

This factor defines the staff and/or program management responsibility, including short and long-range planning, budget development and administration, resource allocation, policy and procedure development, and supervision and direction of staff.

### **A. No ongoing direction of staff**

The employee is responsible for the performance of his or her own work and may provide side-by-side instruction to a co-worker.

### **B. Lead direction of staff or program coordination**

The employee plans, assigns, directs, and reviews the work of staff performing similar work to that performed by the employee on a day-to-day basis. Training in work procedures is normally involved. If staff direction is not involved, the employee must have responsibility for independently coordinating one or more programs or projects on a regular basis.

### **C. Full first-line supervisor**

The employee performs the supervisory duties listed above, and, in addition, makes effective recommendation and/or carries out selection, performance evaluation, and disciplinary procedures. If staff supervision is not involved, the employee must have programmatic responsibility, including development and implementing goals, objectives, policies and procedures, and budget development and administration.

### **D. Manager**

The employee is considered management, often supervising through subordinate levels of supervision. In addition to the responsibilities outlined above, responsibilities include allocating staff and budget resources among competing demands and performing significant program and service delivery planning and evaluation. This level normally reports to the Department Head.



## **E. Executive Management**

The employee has total administrative responsibility for the City and reports to the City Council.

## **3. Supervision Received**

### **A. Direct Supervision**

Direct supervision is usually received by entry-level employees and trainees, i.e., employees who are new to the organization and/or position they are filling. Initially under close supervision, incumbents learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

### **B. General Supervision**

General supervision is usually received by the experienced and journey-level employees, i.e., employees who have been in a position for a period of time and have had the opportunity to be trained and learn most, if not all, duties and responsibilities of the assigned classification. Incumbents are cross-trained to perform the full range of technical work in all of the areas of assignment.

At the experienced-level, positions exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Incumbents have some flexibility in the selection of steps and timing of work processes.

Journey-level positions receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

### **C. General Direction**

General direction is usually received by senior level or management positions. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

### **D. Administrative and Policy Direction**

Administrative direction is usually received by executive management classifications. The incumbent is accountable for accomplishing City-wide planning and operational goals and objectives within legal and general policy and regulatory guidelines. The incumbent is responsible for the efficient and economical performance of the organization's operations.

## **4. Problem Solving**

This factor involves analyzing, evaluating, reasoning, and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.



**A. Structured problem solving**

Employees learn to apply concepts and work procedures and methods in assigned area of responsibility and to resolve problems and issues that are specific, less complex, and/or repetitive. Exceptions or changes in procedures are explained in detail as they arise.

**B. Independent, guided problem solving**

Work situations require making independent decisions among a variety of alternatives; however, policies, procedures, standards, and regulations and/or management are available to guide the employee towards problem resolution.

**C. Application of discriminating choices**

Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate concepts, guidelines, references, laws, regulations, policies, and procedures to resolve diverse and complex problems and issues.

**D. Creative, evaluative, or critical thinking**

The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution.

**5. Authority for Making Decisions and Taking Action**

This factor describes the degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and supervisory or managerial guidance, and the consequence or impact of such decisions are considered within this factor.

**A. Direct, limited work responsibility**

The employee is responsible for the successful performance of his or her own work with little latitude for discretion or decision-making. Work is usually supervised while in progress and fits an established structure or pattern. Direct supervision is readily available.

**B. Decision-making within guidelines**

The employee is responsible for the successful performance of their own work, but able to prioritize and determine methods of work performance within general guidelines. Supervision is available, although the employee is expected to perform independently on a day-to-day basis. Emergency or unusual situations may occur but are handled within procedures and rules. Impact of decisions is normally limited to the work unit, project, or program to which assigned.

**C. Independent action with focus on work achieved**

The employee receives assignments in terms of long-term objectives, rather than day-to-day or weekly timeframes. Broad policies and procedures are provided, but the employee has latitude for choosing techniques and deploying staff and material resources. Impact of decisions may have significant program or City-wide service delivery and/or budgetary impact.

**D. Decisions made within general policy or elected official guidance**

The employee is subject only to the policy guidance of elected officials and/or broad regulatory or legal constraints. The ultimate authority for achieving the goals and objectives of the City are with this employee.



## **6. Interaction with Others**

This factor includes the nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.

### **A. Exchange of factual information**

The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public. Strained situations may occasionally occur, but the responsibilities are normally not confrontational.

### **B. Interpretation and explanation of policies and procedures**

The employee is required to interpret policies and procedures, apply and explain them, and influence the public or others to abide by them. Problems may need to be defined and clarified and individuals contacted may be upset or unreasonable. Contacts may also be made with individuals at all levels throughout the City.

### **C. Influencing individuals or groups**

The employee is required to interpret laws, policies, and procedures to individuals who may be confrontational or to deal with members of professional, business, community, or other groups or regulatory agencies as a representative of the City.

### **D. Negotiation with organizations from a position of authority**

The employee often deals with the City Council, elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of the City, provide policy direction, and/or negotiate solutions to difficult problems.

## **7. Working Conditions/Physical Demands**

This factor includes specific physical, situational, and other factors that influence the employee's working situation.

### **A. Normal office or similar setting**

The work is performed in a normal office or similar setting during regular office hours (occasional overtime may be required but compensated for). Responsibilities include meeting standard deadlines, using office and related equipment, lifting materials weighing up to 25 pounds, and communicating with others in a generally non-stressful manner.

### **B. Varied working conditions with some physical or emotional demands**

The work is normally performed indoors, but may have some exposure to noise, heat, weather, or other uncomfortable conditions. Stand-by, call back, or regular overtime may be required. The employee may have to meet frequent deadlines, work extended hours, and maintain attention to detail at a computer or other machinery, deal with difficult people, or regularly perform moderate physical activity.

### **C. Difficult working conditions and/or physical demands**

The work has distinct and regular difficult demands. Shift work (24-7 or rotating) may be required; there may be exposure to hazardous materials or conditions; the employee may be subject to regular emergency callback and extended shifts; and/or the work may require extraordinary physical demands.

Based on the above factors, in the maintenance of the classification plan when an employee is assigned an additional duty or responsibility and requests a change in classification, it is reasonable to ask:

- What additional knowledge and skills are required to perform the duty?
- How does one gain this additional knowledge and skills – through extended training, through a short-term seminar, through on-the-job experience?
- Does this duty or responsibility require new or additional supervisory responsibilities?
- Is there a greater variety of or are there more complex problems that need to be solved as a result of the new duty?
- Does the employee have to make a greater variety of or more difficult decisions as a result of this new duty?
- Are the impacts of decisions greater because of this new duty (effects on staff, budget, City-wide activities, and/or relations with other agencies)?
- Are guidelines, policies, and/or procedures provided to the employee for the performance of this new duty?
- Is the employee interacting with internal and external stakeholders others more frequently or for a different purpose as a result of this new assignment?
- Have the working or physical conditions of the job changed as a result of this new assignment?

The analysis of the factors outlined above, as well as the answers to these questions, were used to determine recommended classifications for all City employees. The factors above will also help to guide the placement of specific positions to the existing classification structure and/or revision of entire classification structure in the future.

### Classification Allocation Recommendations

All class descriptions were updated in order to ensure that the format is consistent, and that the duties and responsibilities are current and properly reflect the required knowledge, abilities, and skills.

When evaluating the allocation of positions, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are evaluated and classified on the basis of such factors as knowledge and skill required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), the impact of the position on the organization, and working conditions.

Furthermore, it is necessary to: (i) identify the duties that the incumbents are currently being required to perform; (ii) determine if those duties are captured in the current classification description; and (iii) identify the percentage of duties being performed, if any, which are outside of the current classification.

### Title Change

One change in the classification plan, as noted above, was the title change for thirty-two classifications/classification series.

**Table 1. Title Change Recommendations**

Current Title	Recommended Title
A/V Technician	Digital Media Production Technician
Deputy City Clerk	Deputy City Clerk II

Current Title	Recommended Title
Audio Visual System Coordinator	Digital Media Technical Coordinator
Budget and Grants Analyst (Finance Dept.)	Budget Analyst
Building Inspector	Building Inspector I/II
Building Permit Technician	Permit Technician I/II
Contract/Purchasing Technician I/II	Contracts/Purchasing Assistant I/II
CR Property and Evidence Specialist	Property and Evidence Technician I/II
Facilities Maintenance Worker II	Maintenance Worker II
Field Supervisor	Maintenance Supervisor
Fleet Technician	Fleet Technician I
Human Resources Analyst	Human Resources Analyst I/II
Human Resources Technician	Human Resources Technician I/II
IT Technician	IT Technician I/II
Investigative Specialist I/II	Investigative Technician I/II
Media Specialist	Media and Public Information Specialist
Office Specialist II	Office Assistant II
Park Maintenance Worker II	Maintenance Worker I/II
Park/Landscape Maintenance Attendant	Maintenance Assistant
Park/Landscape Maintenance Manager	Community Services Manager-Maintenance & Projects
PD Records Supervisor	Police Records Supervisor
PD Records Technician	Police Records Technician I/II
Plans Examiner	Plans Examiner I/II
Principal Accountant	Senior Accountant
Principal Engineer	Principal Civil Engineer
Public Information Specialist	Media and Public Information Specialist
Public Works Supervisor	Maintenance Supervisor
Senior Engineer	Civil Engineer
Senior Park Maintenance Worker	Senior Maintenance Worker
Senior Street Maintenance Worker	Senior Maintenance Worker
Street Maintenance Worker I	Maintenance Worker I
Street Maintenance Worker II	Maintenance Worker II

Title changes are recommended to reflect the level and scope more clearly being performed, to consolidate work into broader categories that could be used City-wide, as well as establish consistency with the labor market and industry standards. Any compensation recommendations are not dependent upon a new title, but upon the market value as defined by job scope, level and responsibilities, and the qualifications required for successful job performance.

## Reclassification

Reclassification recommendations are made for positions that are working out of class due to level and scope of work and/or job functions that have been added or removed from to those positions over time.

The study resulted in twenty-four incumbents, allocated to twenty classifications, to be reclassified, as noted in the table below. These recommendations are based on the individual positions reviewed. Not every incumbent in the current classification is recommended for a reclassification. It is important to emphasize the point-in-time nature of this study and to acknowledge the dynamic nature of the City's workforce insofar as the City made staffing changes for some positions while we were in the midst of conducting this study due to changes in assignments that occurred for individual positions. These staffing changes may not be reflected in the deliverables we have provided because our recommendations are based on information that was available to us at the time of the study and changes in assignments may have occurred after such time as employees completed PDQs and were interviewed for the study.

**Table 2. Reclassification Recommendations**

Current Title	Recommended Title
Assistant City Engineer	Engineering Manager
Associate Engineer	Civil Engineer
Budget and Grants Analyst (Police Dept.)	Management Analyst II
Code Enforcement Officer I	Code Enforcement Officer II
GIS Coordinator	GIS Program Manager
GIS Technician	GIS Analyst
Human Resources Supervisor	Human Resources Manager
IT Analyst	Systems Administrator
Management Aide	Economic Development Management Analyst I
Management Analyst I (2 positions)	Management Analyst II
Management Analyst I	Human Resources Analyst I
Office Specialist - HR	Human Resources Assistant
Principal Engineer	Civil Engineer
Principal Planner	Senior Planner
Public Works Inspector I (2 positions)	Public Works Inspector II
Senior Code Enforcement Officer	Code Enforcement Officer II
Senior Fire Permit Technician	Permit Technician II
Senior Management Analyst-Confidential	Assistant to the City Manager
Senior PD Records Technician	Police Records Technician II
Senior Management Analyst	Economic Development Management Analyst II
Senior Management Analyst	Housing and Grant Programs Analyst
Senior Personnel and Training Analyst	Management Aide



## New Classifications

The study resulted in three new classifications in addition to those listed in Tables 1 and 2. To accommodate changes in organizational structure and responsibilities the City requested the development of an Assistant City Clerk and Police Corporal classification descriptions.

## Classification Elimination

In addition to classifications eliminated through the title change or reclassification of individual positions, the Assistant City Engineer, Planning Manager, Risk Manager, and Special Project Manager classifications were eliminated based on feedback that the City no longer has a need for these classifications.

## Conclusion

The revised classification descriptions serve as a general description of the work performed and provide a framework of the expectations of each position for the employee. Requests for the addition of new positions and classifications and/or reclassification of an existing position should follow established City policies and procedures. Any decisions related to the addition of new positions and classifications, reclassification of an existing position, and promotion of an existing position will depend on the needs and resources of the City and the availability of work, as well as the ability of existing positions to meet the qualifications of and perform the duties of the higher-level class.

Finally, as mentioned previously, a classification plan is not a static, unchanging entity. The classification plan should be reviewed on a regular, on-going basis and may be amended or revised as required.

It has been a pleasure working with City on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

Respectfully submitted by,

**Gallagher, Formerly Koff & Associates**

Kari Mercer  
Project Manager



**Gallagher**

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# Appendix I

## Classification Plan



**City of Menifee**  
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Current Title	Recommended Title	Class Concept
Accountant Trainee	Accountant I	Professional
Senior Accountant	Accountant II	Professional
Cashier	Accounting Assistant	Staff
Accounting Technician I	Accounting Technician I	Technician
Accounting Technician II	Accounting Technician II	Technician
Administrative Assistant	Administrative Assistant	Staff
New (Requested By City)	Assistant City Clerk	Supervisor
Assistant City Manager	Assistant City Manager	Assistant City Manager
Assistant Engineer	Assistant Engineer	Professional
Assistant Planner	Assistant Planner	Professional
Senior Management Analyst-Conf.	Assistant to the City Manager	Principal
Associate Engineer	Associate Engineer	Professional
Associate Planner	Associate Planner	Professional
Budget And Grants Analyst	Budget Analyst	Professional
Building/Safety Supervisor	Building and Safety Supervisor	Supervisor
Building Inspector	Building Inspector I	Specialist
Building Inspector	Building Inspector II	Specialist
Building Official	Building Official	Deputy Director
Chief Financial Officer	Chief Financial Officer	Department Head
Chief Of Police	Chief of Police	Department Head
City Clerk	City Clerk	Department Head
City Manager	City Manager	City Manager
Senior Engineer	Civil Engineer	Lead
Code Enforcement Officer I	Code Enforcement Officer I	Specialist
Code Enforcement Officer II	Code Enforcement Officer II	Specialist
Code Enforcement Supervisor	Code Enforcement Supervisor	Supervisor
Code Enforcement Technician	Code Enforcement Technician	Technician
Community Development Director	Community Development Director	Department Head
Community Services Coordinator	Community Services Coordinator	Coordinator
Community Services Director	Community Services Director	Department Head
Community Services Leader I	Community Services Leader I	Staff
Community Services Leader II	Community Services Leader II	Staff
Community Services Manager	Community Services Manager	Division Manager
Park/Landscape Maintenance Manager	Community Services Manager-Maintenance and Projects	Division Manager
Community Services Officer I	Community Services Officer I	Technician
Community Services Officer II	Community Services Officer II	Technician
Community Services Specialist	Community Services Specialist	Specialist



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Community Services Supervisor	Community Services Supervisor	Supervisor
Construction Manager	Construction Manager	Program Manager
Contract/Purchasing Technician I	Contracts/Purchasing Assistant I	Staff
Contract/Purchasing Technician II	Contracts/Purchasing Assistant II	Staff
Contract/Purchasing Specialist	Contracts/Purchasing Specialist	Specialist
Crime Analyst	Crime Analyst	Professional
Planning Manager	Delete; no longer needed	
Special Project Manager	Delete; no longer needed	
Deputy City Clerk	Deputy City Clerk I	Specialist
Deputy City Clerk	Deputy City Clerk II	Specialist
Deputy City Manager	Deputy City Manager	Deputy City Manager
Deputy Director - Community Development	Deputy Director - Community Development	Deputy Director
Deputy Human Resources Director	Deputy Director of Human Resources	Deputy Director
Deputy Finance Director	Deputy Finance Director	Deputy Director
Deputy Public Works Director/City Engineer	Deputy Public Works Director/City Engineer	Deputy Director
A/V Technician	Digital Media Production Technician	Technician
Audio Visual System Coordinator	Digital Media Technical Coordinator	Coordinator
Director of Public Works and Engineering	Director of Public Works and Engineering	Department Head
Economic Development Director	Economic Development Director	Department Head
Management Aide	Economic Development Management Analyst I	Professional
Senior Management Analyst	Economic Development Management Analyst II	Professional
Assistant City Engineer	Engineering Manager	Division Manager
Engineering Technician I	Engineering Technician I	Technician
Engineering Technician II	Engineering Technician II	Technician
Executive Assistant	Executive Assistant	Staff
Finance Manager	Finance Manager	Division Manager
Financial Analyst	Financial Analyst	Professional
PW Financial Analyst		
Fleet And Equipment Supervisor	Fleet and Equipment Supervisor	Supervisor
Fleet Services Worker	Fleet Technician I	Technician
Fleet Technician	Fleet Technician II	Technician
GIS Technician	GIS Analyst	Professional
GIS Coordinator	GIS Program Manager	Program Manager
GIS Technician	GIS Technician	Technician
Senior Management Analyst	Housing and Grant Programs Analyst	Professional
Human Resources Analyst	Human Resources Analyst I	Professional
Management Analyst I/II	Human Resources Analyst I/II	Professional
Human Resources Analyst	Human Resources Analyst II	Professional



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Office Specialist II	Human Resources Assistant	staff
Human Resources Manager	Human Resources Manager	Division Manager
Risk Manager		
Human Resources Technician	Human Resources Technician I	Technician
Human Resources Technician	Human Resources Technician II	Technician
Investigative Specialist I	Investigative Technician I	Technician
Investigative Specialist II	Investigative Technician II	Technician
IT Analyst	IT Analyst I	Professional
IT Analyst	IT Analyst II	Professional
IT Director	IT Director	Department Head
IT Manager	IT Manager	Division Manager
IT Technician	IT Technician I	Technician
IT Technician	IT Technician II	Technician
Park/Landscape Maint Attendant	Maintenance Assistant	Staff
Field Supervisor	Maintenance Supervisor	Supervisor
Public Works Supervisor	Maintenance Supervisor	Supervisor
Facilities Maintenance Worker I	Maintenance Worker I	Staff
Park Maintenance Worker I		
Street Maintenance Worker I		
Facilities Maintenance Worker II	Maintenance Worker II	Staff
Street Maint Worker II		
Park Maintenance Worker II		
Management Aide	Management Aide	Technician
Senior Personnel and Training Analyst		
Management Analyst I	Management Analyst I	Professional
Budget and Grants Analyst	Management Analyst II	Professional
Management Analyst II		
Media Specialist	Media and Public Information Specialist	Specialist
Public Information Specialist		
Media/Production Coordinator	Media Production Coordinator	Coordinator
Office Specialist I	Office Assistant I	Staff
Office Specialist II	Office Assistant II	Staff
Park Ranger	Park Ranger	Specialist
Permit Center Coordinator	Permit Center Coordinator	Coordinator
Building Permit Technician	Permit Technician I	Technician
Building Permit Technician	Permit Technician II	Technician
Senior Fire Permit Technician		
Planning Technician	Planning Technician	Technician



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Plans Examiner	Plans Examiner I	Specialist
Plans Examiner	Plans Examiner II	Specialist
Police Captain	Police Captain	Division Manager
New (Requested By City)	Police Corporal	Lead
Police Lieutenant	Police Lieutenant	Division Manager
Police Officer	Police Officer	Specialist
Pd Records Supervisor	Police Records Supervisor	Supervisor
Pd Records Technician	Police Records Technician I	Technician
Senior Pd Records Technician	Police Records Technician II	Technician
Police Sergeant	Police Sergeant	Supervisor
Police Support Services Manager	Police Support Services Manager	Division Manager
Principal Engineer	Principal Civil Engineer	Principal
Principal Planner	Principal Planner	Principal
Cr.Property & Evidence Spec	Property and Evidence Technician I	Technician
Cr.Property & Evidence Spec	Property and Evidence Technician II	Technician
Public Information And Legislative Affairs Officer	Public Information and Legislative Affairs Officer	Supervisor
Public Works Inspector I	Public Works Inspector I	Specialist
Public Works Inspector II	Public Works Inspector II	Specialist
Public Works Manager	Public Works Manager	Division Manager
Receptionist	Receptionist	Staff
Records Technician	Records Technician	Technician
Principal Accountant	Senior Accountant	Lead
Senior Accounting Technician	Senior Accounting Technician	Lead
Senior Building Inspector	Senior Building Inspector	Specialist
Senior Code Enforcement Officer	Senior Code Enforcement Officer	Lead
Senior Community Services Officer	Senior Community Services Officer	Lead
Senior Fleet Technician	Senior Fleet Technician	Lead
Senior Facilities Maintenance Worker	Senior Maintenance Worker	Lead
Senior Park Maintenance Worker		
Senior Street Maintenance Worker		
Senior Management Analyst	Senior Management Analyst	Lead
Senior Planner	Senior Planner	Advanced Professional
Senior Public Works Inspector	Senior Public Works Inspector	Lead
Information Technology Analyst	Systems Administrator	Professional



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Current Title	Recommended Title	Class Concept
A/V Technician	Digital Media Production Technician	Technician
Accountant Trainee	Accountant I	Professional
Accounting Technician I	Accounting Technician I	Technician
Accounting Technician II	Accounting Technician II	Technician
Administrative Assistant	Administrative Assistant	Staff
Assistant City Engineer	Engineering Manager	Division Manager
Assistant City Manager	Assistant City Manager	Assistant City Manager
Assistant Engineer	Assistant Engineer	Professional
Assistant Planner	Assistant Planner	Professional
Associate Engineer	Associate Engineer	Professional
Associate Planner	Associate Planner	Professional
Audio Visual System Coordinator	Digital Media Technical Coordinator	Coordinator
Budget And Grants Analyst	Budget Analyst	Professional
	Management Analyst II	Professional
Building Inspector	Building Inspector I	Specialist
	Building Inspector II	Specialist
Building Official	Building Official	Deputy Director
Building Permit Technician	Permit Technician I	Technician
	Permit Technician II	Technician
Building/Safety Supervisor	Building and Safety Supervisor	Supervisor
Cashier	Accounting Assistant	Staff
Chief Financial Officer	Chief Financial Officer	Department Head
Chief Of Police	Chief of Police	Department Head
City Clerk	City Clerk	Department Head
City Manager	City Manager	City Manager
Code Enforcement Officer I	Code Enforcement Officer I	Specialist
Code Enforcement Officer II	Code Enforcement Officer II	Specialist
Code Enforcement Supervisor	Code Enforcement Supervisor	Supervisor
Code Enforcement Technician	Code Enforcement Technician	Technician
Community Development Director	Community Development Director	Department Head
Community Services Coordinator	Community Services Coordinator	Coordinator
Community Services Director	Community Services Director	Department Head
Community Services Leader I	Community Services Leader I	Staff
Community Services Leader II	Community Services Leader II	Staff
Community Services Manager	Community Services Manager	Division Manager
Community Services Officer I	Community Services Officer I	Technician
Community Services Officer II	Community Services Officer II	Technician



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Community Services Specialist	Community Services Specialist	Specialist
Community Services Supervisor	Community Services Supervisor	Supervisor
Construction Manager	Construction Manager	Program Manager
Contract/Purchasing Specialist	Contracts/Purchasing Specialist	Specialist
Contract/Purchasing Technician I	Contracts/Purchasing Assistant I	Staff
Contract/Purchasing Technician II	Contracts/Purchasing Assistant II	Staff
Cr.Property & Evidence Spec	Property and Evidence Technician I	Technician
	Property and Evidence Technician II	Technician
Crime Analyst	Crime Analyst	Professional
Deputy City Clerk	Deputy City Clerk I	Specialist
	Deputy City Clerk II	Specialist
Deputy City Manager	Deputy City Manager	Deputy City Manager
Deputy Director - Community Development	Deputy Director - Community Development	Deputy Director
Deputy Finance Director	Deputy Finance Director	Deputy Director
Deputy Human Resources Director	Deputy Director of Human Resources	Deputy Director
Deputy Public Works Director/City Engineer	Deputy Public Works Director/City Engineer	Deputy Director
Director of Public Works and Engineering	Director of Public Works and Engineering	Department Head
Economic Development Director	Economic Development Director	Department Head
Engineering Technician I	Engineering Technician I	Technician
Engineering Technician II	Engineering Technician II	Technician
Executive Assistant	Executive Assistant	Staff
Facilities Maintenance Worker I	Maintenance Worker I	Staff
Facilities Maintenance Worker II	Maintenance Worker II	Staff
Field Supervisor	Maintenance Supervisor	Supervisor
Finance Manager	Finance Manager	Division Manager
Financial Analyst	Financial Analyst	Professional
Fleet And Equipment Supervisor	Fleet and Equipment Supervisor	Supervisor
Fleet Services Worker	Fleet Technician I	Technician
Fleet Technician	Fleet Technician II	Technician
GIS Coordinator	GIS Program Manager	Program Manager
GIS Technician	GIS Analyst	Professional
	GIS Technician	Technician
Human Resources Analyst	Human Resources Analyst I	Professional
	Human Resources Analyst II	Professional
Human Resources Manager	Human Resources Manager	Division Manager
Human Resources Technician	Human Resources Technician I	Technician
	Human Resources Technician II	Technician
Information Technology Analyst	Systems Administrator	Professional



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Investigative Specialist I	Investigative Technician I	Technician
Investigative Specialist II	Investigative Technician II	Technician
IT Analyst	IT Analyst I	Professional
	IT Analyst II	Professional
IT Director	IT Director	Department Head
IT Manager	IT Manager	Division Manager
IT Technician	IT Technician I	Technician
	IT Technician II	Technician
Management Aide	Economic Development Management Analyst I	Professional
	Management Aide	Technician
Management Analyst I	Management Analyst I	Professional
Management Analyst II	Management Analyst II	Professional
Management Analyst I/II	Human Resources Analyst I/II	Professional
Media Specialist	Media and Public Information Specialist	Specialist
Media/Production Coordinator	Media Production Coordinator	Coordinator
New (Requested By City)	Assistant City Clerk	Supervisor
New (Requested By City)	Police Corporal	Lead
Office Specialist I	Office Assistant I	Staff
Office Specialist II	Human Resources Assistant	staff
	Office Assistant II	Staff
Park Maintenance Worker I	Maintenance Worker I	Staff
Park Maintenance Worker II	Maintenance Worker II	Staff
Park Ranger	Park Ranger	Specialist
Park/Landscape Maint Attendant	Maintenance Assistant	Staff
Park/Landscape Maintenance Manager	Community Services Manager-Maintenance and Projects	Division Manager
Pd Records Supervisor	Police Records Supervisor	Supervisor
Pd Records Technician	Police Records Technician I	Technician
Permit Center Coordinator	Permit Center Coordinator	Coordinator
Planning Manager	Delete; no longer needed	
Planning Technician	Planning Technician	Technician
Plans Examiner	Plans Examiner I	Specialist
	Plans Examiner II	Specialist
Police Captain	Police Captain	Division Manager
Police Lieutenant	Police Lieutenant	Division Manager
Police Officer	Police Officer	Specialist
Police Sergeant	Police Sergeant	Supervisor
Police Support Services Manager	Police Support Services Manager	Division Manager
Principal Accountant	Senior Accountant	Lead



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Principal Engineer	Principal Civil Engineer	Principal
Principal Planner	Principal Planner	Principal
Public Information And Legislative Affairs Officer	Public Information and Legislative Affairs Officer	Supervisor
Public Information Specialist	Media and Public Information Specialist	Specialist
Public Works Inspector I	Public Works Inspector I	Specialist
Public Works Inspector II	Public Works Inspector II	Specialist
Public Works Manager	Public Works Manager	Division Manager
Public Works Supervisor	Maintenance Supervisor	Supervisor
PW Financial Analyst	Financial Analyst	Professional
Receptionist	Receptionist	Staff
Records Technician	Records Technician	Technician
Risk Manager	Human Resources Manager	Division Manager
Senior Accountant	Accountant II	Professional
Senior Accounting Technician	Senior Accounting Technician	Lead
Senior Building Inspector	Senior Building Inspector	Specialist
Senior Code Enforcement Officer	Senior Code Enforcement Officer	Lead
Senior Community Services Officer	Senior Community Services Officer	Lead
Senior Engineer	Civil Engineer	Lead
Senior Facilities Maintenance Worker	Senior Maintenance Worker	Lead
Senior Fire Permit Technician	Permit Technician II	Technician
Senior Fleet Technician	Senior Fleet Technician	Lead
Senior Management Analyst	Economic Development Management Analyst II	Professional
	Housing and Grant Programs Analyst	Professional
	Senior Management Analyst	Lead
Senior Management Analyst-Conf.	Assistant to the City Manager	Principal
Senior Park Maintenance Worker	Senior Maintenance Worker	Lead
Senior Pd Records Technician	Police Records Technician II	Technician
Senior Personnel and Training Analyst	Management Aide	Technician
Senior Planner	Senior Planner	Advanced Professional
Senior Public Works Inspector	Senior Public Works Inspector	Lead
Senior Street Maintenance Worker	Senior Maintenance Worker	Lead
Special Project Manager	Delete; no longer needed	
Street Maint Worker II	Maintenance Worker II	Staff
Street Maintenance Worker I	Maintenance Worker I	Staff



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## **Appendix II**

### **Classification Concepts**



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# City of Menifee Classification Concepts

## Classification Type – General Definitions

Classification type represents the grouping of classifications into a systematic classification structure based on the inter-relationship of duties performed, nature and level of responsibilities, and required knowledge, skills, abilities, education, training, and experience.

- City Manager
- Assistant City Manager
- Deputy City Manager
- Department Head
- Assistant Department Head
- Deputy Department Head
- Division Manager
- Program Manager
- Principal
- Supervisor
- Senior
- Professional
- Coordinator
- Specialist
- Technician
- Staff

Within each classification series, there may exist a classification at each level or only at selected levels. The levels within the classification series reflect the City's needs and priorities. For example, in some classification series, there is no need for functions to be performed at the experienced, advanced, or supervisor level. Distinctions between levels within classification series can be defined based on scope of responsibility, complexity of work, supervision received and exercised, authority for making decisions and taking action, and type and level of required knowledge, skills, abilities, education, training, and experience. Following are descriptions of each classification type.

## Management and Supervisory Class Concepts

### City Manager

Plans, organizes, and provides administrative direction and oversight for all City functions and activities. Provides policy guidance and program evaluation to City Council (Council) and management staff; and assumes responsibility for the development, implementation, and execution of short- and long-term goals, policies, budgets, and strategies to accomplish the City's mission and Council priorities.



## **Assistant City Manager**

Plans, organizes, manages, and provides administrative direction and oversight for all functions and activities of multiple departments as well as assists the City Manager in the overall administration of agency-wide programs, projects, and initiatives. Provides highly responsible and complex management assistance to the City Manager and City Council in coordinating and directing City-wide activities and operations. Assists the City Manager in executing the long-term vision for the City in collaboration with the Council and other department directors.

## **Deputy City Manager**

Plans, organizes, manages, and provides administrative direction and oversight for the functions and activities of assigned departments and/or programmatic areas. Provides highly responsible and complex management assistance to the City Manager and Assistant City Manager in coordinating and directing the activities and operations of assigned departments/functional areas. While the Deputy City Manager provides some assistance with overall City administration, this concept is typically more involved in the operations, planning, and service delivery of assigned departments, programs, and projects.

## **Department Head**

- In many organizations this is usually the classification titled as “Director” or “Chief”

Plans, organizes, manages, and provides administrative direction and oversight for all functions and activities of the assigned department. Provides highly responsible and complex management assistance to the City Manager in coordinating and directing City-wide departmental activities and operations. Assists the City Manager in executing the long-term vision for the City in collaboration with the City Council and other department directors. Coordinates assigned activities with officials and outside agencies and fosters cooperative working relationships among City departments and with intergovernmental and regulatory agencies and various public and private groups.

Work situations require the analysis and application of organizational policies and goals, complex laws, and/or general business or ethical considerations. Positions operate in highly visible, politically sensitive, legally complex, and evolving arenas working on significant and strategic issues and problems, as well as City-wide and/or City Council priorities and directives, requiring political sensitivity and in-depth evaluation and analysis of various (and often competing) circumstances, interests, and information. Incumbents are responsible for achieving departmental goals and objectives. Incumbents often deal with public officials; members of boards, councils, and commissions; legislators; regulatory agencies; and the community to provide policy direction, explain program mission and objectives, and/or negotiate solutions to difficult problems.

## **Assistant Department Head**

- The title is generally “Assistant Director,” but other industry standard titles exist

This generally refers to a “second in command” classification which oversees the day-to-day operations of a department; in these cases, the position carries the same types of operational responsibilities as the department head but may not have direct accountability for strategic or policy related planning and development; lower-level management and/or supervisory positions generally report to these positions.

This concept is generally used in larger departments where there are multiple divisions and/or functional areas.

## **Deputy Department Head**

- The title is generally “Deputy Director,” but other industry standard titles exist



This classification is considered mid-management within a department, managing through subordinate levels of management. In addition to the responsibilities outlined at the manager level, responsibilities include allocating staff and budget resources among competing demands and performing significant service delivery planning and evaluation at the division level (defined as a major segment of the organization consisting of multiple units and subunits, each with a specific service function) which has a chain of command including subordinate management, supervisory, advanced professional, technical, and clerical staff classifications.

The main difference between the deputy director and the manager is that the latter has management responsibility over a recognized section of the organization, while the former oversees multiple subunits through subordinate managers. The deputy director concept will typically be found in larger departments which require a deeper management structure due to the breadth of the department's operations and functional areas, and size of the department's workforce.

The deputy director spends the majority of their time on policy development and administration; long- and short-term planning; ensuring compliance with laws, City ordinances, codes, and regulations; and budgeting responsibilities. The deputy director level develops, recommends, and sets the programs, projects, goals, and policies and procedures of the division.

## Division Manager

- The title is generally "Manager" but other industry standard titles exist.

This classification level is considered mid-management. In addition to the responsibilities outlined at the supervisor level, responsibilities include allocating staff and budget resources among competing demands and performing significant service delivery planning and evaluation at the subunit level. This level would be responsible for a unit, defined as a segment of the organization representing a specific business function which has a chain of command that includes a breadth of classification types including supervisory, advanced professional, technical, and clerical staff classifications. Managers typically manage assigned operations through subordinate supervisors.

The main difference between the supervisor and the manager is that the supervisor spends a portion of time performing the same or similar duties as those supervised within their unit(s), while a manager spends the majority of time on administrative, long- and short-term planning, and budgeting responsibilities. The managerial level develops, recommends, and sets the programs, projects, goals, and policies and procedures of the division, while the supervisory level is more involved in the day-to-day implementation and execution of those programs, projects, and policies and procedures.

- In essence the manager focus is on "the why" and the supervisor focus is on "the how".

## Program Manager

This classification is typically responsible for a program, defined as a planned coordinated group of activities and procedures created for a specific function related to ongoing City operations, initiatives, and services, as well as management and/or City Council priorities and directives. A program encompasses multiple projects with department-wide and community served impact. Employees are responsible for designing, planning, implementing, evaluating, and modifying the program, including short- and long-term planning activities; budget preparation and implementation; performing extensive, in-depth, and specialized administrative, budgetary, financial, and compliance research, analysis; supporting and analyzing programmatic practices and procedures; and developing and implementing recommendations for operational, policy, and procedural improvements for the assigned program(s). Employees serve as a specialist, liaison, and advocate for the assigned program(s) requiring the use of initiative and resourcefulness.



considerable independent judgment, and regular contact with senior management positions within the City, other public agencies, legislators, private and community organizations, regulatory and governmental agencies, and the public.

The Program Manager concept performs many of the same administrative, planning, and budgeting duties for assigned programmatic areas as does the Manager concept, but a Program Manager typically has responsibility for oversight of contracted staff or consultants with few or no City employees as direct reports versus a Manager's responsibility for a reporting structure consisting of City employees. A Program Manager focuses on program effectiveness, relevance, activities, initiatives, and functions; a Manager focuses on overall operations of a unit within a department.

## **Principal**

The principal is typically seen as a deep subject matter expert that provides professional support relative to highly technical and/or sensitive projects/programs; assists other divisions and/or departments in obtaining information and development of recommendations regarding management issues; and assists in the development of new programs and/or addition/modification of program elements as needed to meet goals and objectives. This position functions as the "manager of" a large program and/or multiple projects with significant impact not only organization-wide but also on the community at large and may affect outside agencies and other entities. The employee is responsible for designing, planning, implementing, and maintaining the program, including short- and long-term planning activities, budget preparation and implementation, analyzing data for trends, and community education and outreach. Responsibilities include performing diverse, specialized, and complex work involving significant accountability and decision-making responsibility, as well as extensive staff, public, and organizational contact. Successful performance of the work requires skill in managing projects and coordinating assigned work with other departments and outside entities.

Work situations require the analysis and application of organizational policies and goals, complex laws, and/or general business or ethical considerations. The employee is subject only to the policy guidance of executive management and/or broad regulatory or legal constraints. The ultimate authority for achieving the goals and objectives of the program are with this employee. The employee often deals with public officials, members of boards, councils, commissions, and others to provide policy direction, explain program missions, and/or negotiate solutions to difficult problems.

The principal usually does not have supervisory responsibilities as a focus area or main function of the job but may provide direction and oversight to other staff on a project-basis and/or to contract and consultant staff.

## **Supervisor**

The focus of the job is on the direct supervision and coordination of a work unit, and also includes hands-on participation in the work activities of those supervised. Incumbents plan, assign, direct, review, and evaluate the work of staff. In addition, incumbents assigned to this level make effective recommendations and/or carry out selection, performance evaluation, and disciplinary procedures.

The supervisor also exercises discretion in selecting appropriate resources to use in accomplishing assigned work; monitors and reviews work in progress, and provides technical assistance and guidance; ensures that appropriate policies and procedures are followed by subordinates; monitors, coordinates, and provides input into developing the budget for the subunit(s); and recommends procedures consistent with unit, divisional, and City directives, polices, and regulations, which are developed by higher-level management staff.



## **Senior (i.e., “Lead”)**

This is an advanced journey level classification that bridges the gap between a journey level position below and the supervisory position above. The position has ongoing responsibility to lead the work of a work unit, or a small group of staff engaged in the same type of work. The “Senior” title is the industry standard (vs. “Lead” – although “Lead” is still seen in public agency operations departments). This level plans, schedules, assigns, provides performance feedback, and trains employees, and is responsible for the “work” not the “worker.” This is differentiated by the full Supervisor level above which is responsible for the “worker,” including counseling, disciplining, and conducting performance evaluations.

These employees provide technical and functional direction to assigned staff on an ongoing, day-to-day basis, and perform the most difficult and complex assignments.

## **Non-Management Class Concepts**

### **Professional**

This classification performs operational, financial, budgetary, legal, regulatory, political, and/or administrative analyses and studies; researches and analyzes practices and procedures, and develops recommendations for organizational, operational, policy, and procedural improvements; and conducts needs analyses, feasibility studies, and evaluations for assigned programs, projects, and activities. Other professional level classes perform discipline specific activities within a given occupation, such as planning or engineering. Employees receive broad (non-detailed and non-specific) assignments and/or tasks and are responsible for independently developing a plan of action and approach; identifying, synthesizing, and interpreting relevant sources of data and information; selecting and implementing methodology; analyzing and interpreting results; developing recommendations; and presenting final products for supervisor and management review. Work assignments are reviewed during the normal briefing cycle, generally upon completion, and for overall results. Decisions may have significant unit, division, or City-wide service delivery, operational, legislative, regulatory, and/or budgetary/financial impact. A four-year degree in the area assigned is typically a minimum qualification.

### **Coordinator**

The term “Coordinator” is often used for classes responsible for the coordination and administration of one or more programs or projects in a department/division with external contractors, agencies, and/or service providers.

The employee would typically have responsibility for independently coordinating one or more programs or projects on a regular basis. The duties involved would include the implementation of the program’s or project’s goals and objectives, oversight of performance, input as to budget preparation and administration, promotion or marketing, and evaluation. Incumbents at this level may have limited supervisory responsibility such as exercising functional and technical supervision over full-time staff, or directing part-time, temporary, and/or contract staff, volunteers, and/or interns. This concept can also be adapted to administrative types of program operations, either within a larger department or positions which oversee a City-wide administrative program.

### **Specialist**

This is a paraprofessional classification that performs a combination of duties requiring the application of knowledge obtained from technical, vocational education, and/or experience usually provided through a two-year degree and/or post-secondary coursework and/or training. The work differs from the technician because it serves as a bridge classification to a professional series, and incumbents exercise broader discretion and independent judgment with a



deeper understanding of the assigned subject matter area relative to the technician. This type and level of work can be found in departments where specialized assignments exist in administrative or operational areas.

## Technician

- Examples of titles typically include “Technician” and “Operator”

This is a technical classification that performs a combination of duties which also require the application of knowledge obtained through technical or vocational education and experience, usually provided through a two-year degree and/or post-secondary coursework and training, or for skilled and semi-skilled labor, in a formal apprenticeship type program or through extended periods of on-the-job training. Employees assume regular on-going work that involves specific technical and programmatic skills and abilities, requiring the interpretation and application of practices of greater complexity and with a deep knowledge base as it relates to the assignment.

## Staff

- Examples of titles typically include “Assistant” and “Worker”

This type of classification performs duties which are routine and often repetitive. For administrative positions it is often described as “transactional” work wherein employees process information and documents in which they have limited decision making latitude; generally, employees will follow established standard operating procedures within established guidelines under which decisions are made; examples would be an Accounting Assistant processing accounts payable, or an Office Assistant responsible for reception, data entry, filing, and general routine office support duties. The positions perform a combination of duties requiring the application of knowledge obtained from a high school education. Maintenance/field positions within this category engage in work that is predominantly standard and customarily mental, manual, mechanical, or physical work. The work is transactional, meaning that the focus is on maintaining the normal workflow of operations and the work typically fits within established techniques, procedures, processes, or specific standards. Typically, employees acquire their skill by experience rather than by advanced specialized intellectual instruction.

## Levels of Work in Non-Management Classification Series

Where there are multiple levels of work within a classification series, these levels should be distinguishable, and generally fall within the following levels of work. Not every classification series will have all levels. These concepts are used throughout the organization for non-management positions, ranging from professional classes to maintenance and operations classes.

- **Entry**

The entry level of a classification series provides an on-the-job opportunity for employees to gain the experience needed to perform the full range of duties. Employees at this level of the class series have the necessary education to perform the work, but they lack the practical on-the-job experience required to perform the full range of duties. Employees at this level will perform the more routine duties assigned to the class series, and will require a high level of supervision until such time as they are fully proficient in the work. The most common designation for entry level work is a “I” after the class title (e.g., Accounting Assistant I or Maintenance Worker I); in some professional classes, “Assistant” may be placed before the class title to designate the class as entry level (e.g. Assistant Civil Engineer or Assistant Planner).

- **Journey/Fully Proficient**



Positions at the journey level of the series are fully proficient and qualified to perform the full range of duties assigned to the classification series. At this level, positions are subject to general supervision, referring only unusual situations and issues to their supervisor. The most common designation for journey level work is a “II” after the class title (e.g., Accounting Assistant II or Maintenance Worker II); in some professional classes, “Associate” may be placed before the class title to designate the class as journey level (e.g. Associate Civil Engineer or Associate Planner). In most classification series, the majority of positions will be placed at the journey level, since that is considered to be the core level of work, (i.e., performing the full range of duties).

- **Advanced**

In addition to performing the full scope of work, employees perform the most difficult and complex assignments requiring the advanced knowledge of concepts in their assigned area of responsibility, as well as City and regulatory standards, practices, policies, and procedures. For professional classes, responsibilities include performing diverse, specialized, and complex work involving significant accountability and decision-making responsibility. Employees are responsible for providing support to an assigned supervisor/unit manager in a variety of areas. Successful performance of the work requires an extensive background as well as the ability to coordinate one’s own work with that of other units and outside agencies.

For some positions at the technical and clerical level, the work involves a high-level of problem-solving requiring analysis of unique issues or problems without precedent and/or structure and formulating and presenting strategies and recommendations to management. It is preferable to limit the use of the advanced level concept to those positions that also have lead related duties (i.e., the Senior level) but that is not always feasible. For an advanced-level classification, you must ensure that:

- The complex duties are distinguishable from journey level work and can be clearly articulated;
- They should also be preponderant (i.e., the purpose why the job exists); and
- They should be performed a high percentage of time. For example, 10% of time (4 hours/week) is not a significant amount of time.

*By its very definition, the number of positions assigned to the advanced level is limited and many classification series/job families do not necessitate an advanced level.*

## Flexible Staffing Entry/Journey Classifications

Flexible staffing is a strategy wherein the assigned work is the same at the entry and journey level of the series, but the organization wants some flexibility in how positions progress to the journey level. The position is budgeted at the journey level, but appointment into the class series could be made at either the entry or the journey level, depending on applicant skills and/or the desire to provide advancement opportunities for current staff who have the necessary education to move into the entry level, but who need time on the job to acquire knowledge of the necessary departmental operations in order to perform the full range of duties.

Some Gallagher recommendations include the use of flexible staffing; the methodology and language for the concept are presented below:

- We do not recommend the use of time frames for progression since they vary based on the classification, and can lead to an expectation of progression to the next level within the time range specified in the classification specification, rather than the other key factors for progression (i.e., being able to demonstrate that the employee has reached the level of knowledge and ability that allows them to perform the full range of duties of the class with minimal supervision); we present below some classification specification language to address this issue:



- “Positions in the Office Assistant class series are flexibly staffed and positions at the II-level may be filled by advancement from the I-level; progression to the II-level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the II-level. ”
- We also suggest a modified approach to typical duties, and knowledge and abilities statements in entry/journey flexibly staffed classes. In these cases, the entry level is the “learning” level within the series, so you will frequently see statements such as “ability to learn” for specific areas; this sometimes leads employees to believe that once they have completed the learning identified in a specific statement, they should then be progressed to the journey level. For that reason, we recommend incorporating the following “learning capacity” statement:
  - Typical Duties – “Some duties, knowledge, skills, and abilities may be performed by entry level (I-level) positions in a learning capacity.”

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