



Proposal to Conduct a
Classification Study for the
City of Merced

Submitted: March 13, 2017
Ralph Andersen & Associates





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Rocklin, California 95765
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March 13, 2017

Ms. Deneen Proctor
Director of Support Services
City of Merced
678 West 18th Street
Merced, California 95340

Dear Ms. Proctor:

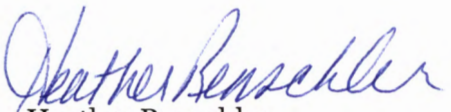
We are pleased to submit our proposal to conduct a comprehensive Classification Study for the City of Merced. The scope of the study includes 163 job classifications and 460 full-time employees. To facilitate your review, the proposal includes the following:

- **Description of the Firm** – A description of the firm including our staffing, history, and services.
- **Experience of the Firm** – References for the firm including municipal projects with a similar scope of services.
- **The Team** – Resumes of the staff who will be assigned to this project.
- **Work Plan and Methodology** – A description of methodologies and a detailed work plan that has proven to be successful in completing similar projects.
- **Timeline** – A proposed timeline for the project.
- **Project Fee** – Proposed 'fixed fee' for completing the study as proposed in the work plan, with a breakdown of professional services and expenses.

I am certain that you will find our work plan is responsive to each of your study objectives, and our reputation and experience are unmatched in successfully completing consulting engagements of this nature. Ralph Andersen & Associates is a leader in providing local government consulting services and has successfully completed hundreds of classification and compensation studies.

The full resources of the firm will be available to perform consulting services for the duration of the project. Doug Johnson, Vice President, will be the Project Manager for this engagement and will have the assistance of an experienced consulting team. If you have any questions or need additional information, please do not hesitate to contact Doug Johnson at (916) 630-4900. We look forward to the opportunity to work with you on this important assignment.

Sincerely,



Heather Renschler
President/CEO

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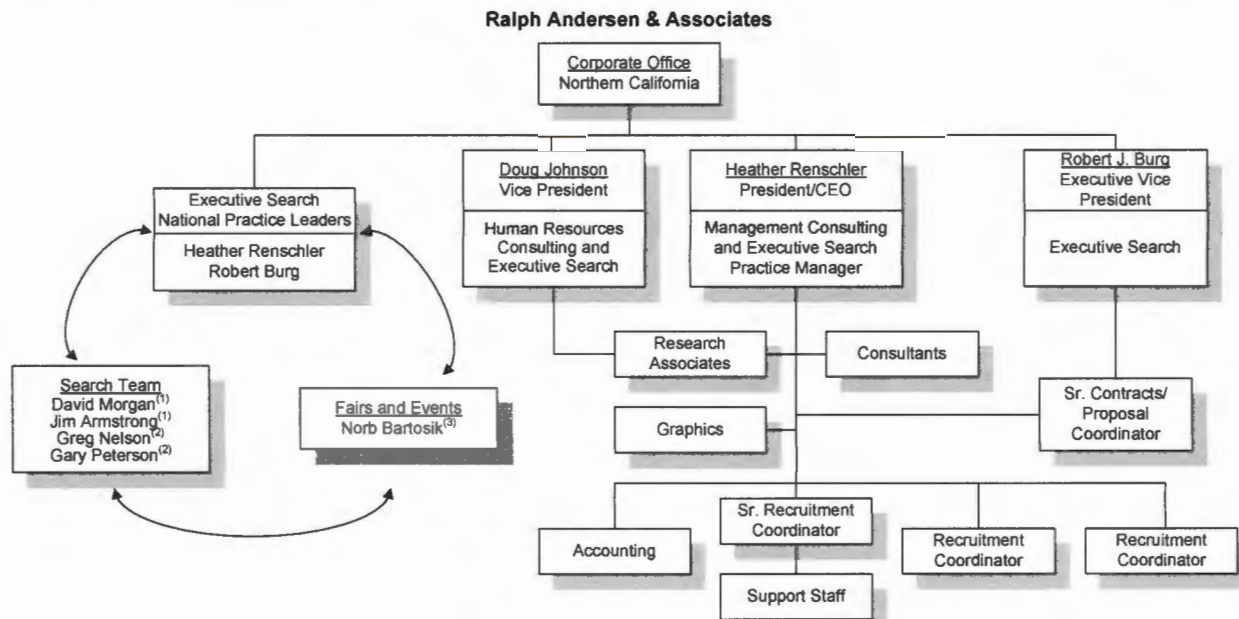
1 – Description of the Firm

Firm Background

Ralph Andersen & Associates has over 44 years of local government consulting experience serving the needs of cities, counties, utilities, special districts, community colleges, schools, non-profit organizations, and state governments. Key service areas of the firm include:

- Human Resources Consulting
- Executive Search
- Management Consulting.

Ralph Andersen & Associates serves a nationwide clientele through its Corporate Office in the Sacramento area (Rocklin, California). A multi-disciplined, full-service local government consulting organization, Ralph Andersen & Associates is dedicated to helping our clients improve operating efficiency and organizational effectiveness. The firm employs 17 full-time staff, 3 part-time staff, and has additional contractors and affiliations as needed to provide a full range of services. A corporate organization chart is provided below.



⁽¹⁾Former City Manager

⁽²⁾Former Police Chief

⁽³⁾Former Fair CEO

Updated January 2017

For this project, staff from the firm's human resources practice will provide the consulting services. The human resource practice focuses on those services that are not easily provided by in-house human resources staff. Key services include:

- **Classification Studies** – These projects include job analysis, class plan development, position allocation, career ladders, class specifications, FLSA analysis, ADA compliance, and related analysis.

- **Compensation Studies** – The firm provides a full range of compensation services including labor market selection, base salary and benefit surveys, private-public data comparisons, benchmark selection, and internal relationship analysis.
- **Expert Testimony and Arbitration Support** – The firm has had significant experience providing technical support in arbitration and mediation hearings and has significant experience working with labor and management groups. This expertise includes the selection of comparable agencies and the elements of compensation appropriate for labor market surveys.
- **Job Evaluation Systems** – In addition to having a copyrighted Point Factor Job Evaluation System, the staff of Ralph Andersen & Associates have significant expertise in developing customized job evaluation systems and “hybrid” solutions.
- **Performance Management Programs** – Performance management serves as a foundation for measuring/tracking organization and employee performance. We have several standard systems that have demonstrated success in a variety of public agencies. In addition, Ralph Andersen & Associates can develop tailored performance management systems to fit the unique needs of our clients.
- **Pay-for-Performance/Incentive Programs** – Ralph Andersen & Associates is a leader in developing effective pay-for-performance programs for public agencies including merit progression systems, lump sum and incentive programs, and other mechanisms tied to employee or organizational measurement criteria.
- **Technical Assistance** – Ralph Andersen & Associates also provides a full range of hourly technical assistance including conducting job audits, support for labor relations, and expert testimony.

Additional information about the firm’s services and background can be found at our web site at www.ralphandersen.com.

Project Approach

The approach our firm uses to conduct classification and compensation studies is customized to the specific needs and objectives of each client. While the work plan we have provided in this proposal is proven, we are happy to adapt our work plan and approach as needed during project initiation meetings and throughout the process. Our firm has an outstanding reputation working with elected officials, managers, and labor representatives. Our goal is to provide products and deliverables that ensure implementation by the City. Highlights of our approach include:

- A transparent and collaborative process. We have significant experience working with diverse stakeholders and ensuring that the project deliverables meet the objectives of the City. Our efforts include briefing sessions, meetings, workshops, and a comprehensive and interactive review of draft reports. We are confident in our ability to research and respond to issues that require clarification and to provide information and data that responds to issues of disagreement.
- Custom data presentations including base salary and benefits data. We do not rely on “canned” data analysis tools. The firm uses dynamic Excel spreadsheets and can prepare total compensation datasheets for all survey jobs.
- We are one of the few firms that has experience with private sector data analysis. We subscribe to the largest private sector database in North America, which is updated quarterly. This data can be regionalized to fit the recruitment region of the City.

- Extensive review and input by managers, employees, labor representatives, and elected officials. We provide easy to review draft reports and work with the City to ensure that the final reports meet or exceed all study objectives.

We will review our recommended approach including communication and stakeholder interaction plans with the City at the beginning of the project to ensure the City's requirements are fully incorporated into the work plan.

2 – Experience of the Firm

References

The staff of Ralph Andersen & Associates has extensive experience providing services directly related to those sought by the City of Merced for hundreds of clients. The firm utilizes a project management system that helps meet project deadlines while balancing the firm's staff resources. We do not rely on outside contractors.

The firm has conducted numerous classification studies for clients similar in size to the City of Merced. The following references represent just a small sample of similar assignments conducted by the firm. We are certain you will find that our record and our reputation are outstanding.

City of Lake Forest, CA

Scope of Work: Ad hoc consulting services including organizational analysis, classification studies, and compensation studies. This is an ongoing project.

Contact: Debra DeBruhl Rose, Assistant City Manager
25550 Commercentre Drive, Suite 100, Lake Forest, CA 92630
(919) 461-3414
drose@lakeforestca.gov

City of Irwindale, CA

Scope of Work: Classification and Compensation Study in 2016 for all city classifications.

Contact: Mary Hull, Human Resources Manager
5050 North Irwindale Ave, Irwindale, CA 91706
(626) 430-2204
mhull@irwindaleca.gov

City of Simi Valley, CA

Scope of Work: Citywide classification and total compensation study involving all jobs and employee groups.

Contact: Valerie Barroso, Senior Human Resources Analyst
2929 Tapo Canyon Rd, Simi Valley, CA 93064
(805) 583-6742
VBarroso@simivalley.org

A five year client listing is provided in Appendix A.

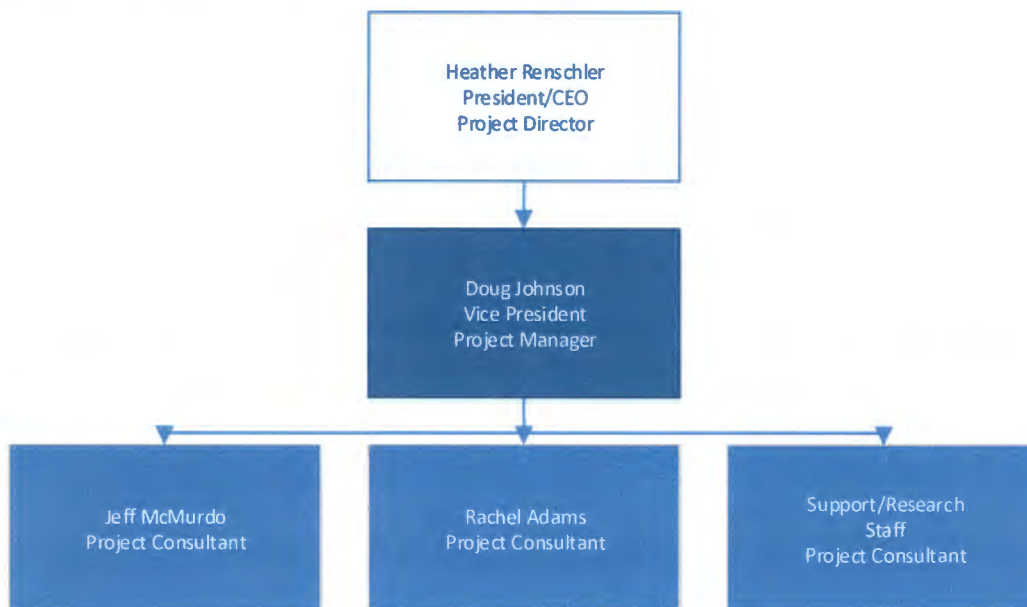
3 – The Team

Project Staffing

Consultants, complemented by consulting firms, define the difference between success and failure in projects of this nature. Ralph Andersen & Associates understands that selection of a project team with the right mix of skills and experience is the most important decision that will be made during the study. The team must be well led and the project well managed if the study objectives are to be achieved.

In defining the project team for this engagement, consideration of the current workload of all consulting staff was taken into account to ensure our ability to fully meet your stated needs and objectives. Doug Johnson, Vice President, will serve as the Project Manager and will have responsibility for all primary contact with the City as well as all on-site review meetings and presentations. Mr. Johnson has managed hundreds of consulting engagements including large public agencies throughout California and the United States.

As shown in the chart, the staffing for this project will include:



- **Doug Johnson, Vice President** – Mr. Johnson will serve as the Project Manager and will conduct all on-site meetings, prepare all written reports, and serve as chief analyst on the project. He is the firm's most experienced Project Manager and has expertise in working with cities similar to Lemoore involving complex classification and compensation issues.
- **Jeff McMurdo, Consultant** – Mr. McMurdo is the most experienced consultant at the firm and has extensive experience conducting employee interviews, developing classification recommendations, developing job descriptions, and collecting and analyzing market data.

- **Rachel Adams** – Ms. Adams has extensive research and analytical experience conducting market studies and is also involved in employee interviews and the development of job descriptions.

All three of these staff members are available for the scheduled duration of the project. Anticipated workloads for all staff have been considered in assigning staff to this project. The firm's staffing and project management systems allow for multiple studies to be conducted simultaneously without impacting the completion dates of the project. Brief staff resumes are provided below.

Doug Johnson, Vice President

Mr. Johnson is currently a Vice President with Ralph Andersen & Associates and has over 29 years of local government consulting experience. Mr. Johnson has 16 years of experience with Ralph Andersen & Associates in addition to 13 years as President of Johnson & Associates, a human resources consulting firm. Mr. Johnson is the firm's expert in job analysis, market comparability, compensation, benefits, and related matters. He has served as an expert witness in arbitration proceedings and mediation sessions, mostly involving police and fire issues. He has extensive experience working with elected officials, public executives, staff members, labor organizations, and ad-hoc committees. He leads the firm's human resource consulting services and participates in all facets of the firm's recruitments.

Mr. Johnson's expertise includes consulting experience with public agencies throughout the United States including cities, counties, utilities, community colleges, school districts, special districts, nonprofit organizations, and private companies. Mr. Johnson has provided consulting assistance to hundreds of public sector agencies and is a recognized expert in compensation issues. Specific areas of expertise include:

- Job classification studies
- Job evaluation system design and implementation
- Pay plan development and administration
- Market comparability research and analysis
- Total compensation analysis
- Private sector data analysis
- Performance management.

Mr. Johnson holds a Bachelor of Arts degree in Psychology with a minor in Communication Studies from California State University, Sacramento. His course work emphasized organizational development and performance incentives. He is an active member of WorldAtWork, The Total Rewards Association.

Jeff McMurdo, Consultant

Mr. McMurdo has over 16 years of consulting experience and serves on a variety of project consulting teams focusing on classification and compensation plan development. He has primary responsibility for conducting market research on compensation studies and participates extensively in the employee interview and review phases of classification studies. Key responsibilities of Mr. McMurdo include:

- Conducting job analysis interviews, analyzing positions and job classifications, and preparing job descriptions.

- Designing survey data collection forms, questionnaires, and related instruments.
- Market survey research including the review and analysis of budgets, organization charts, MOUs, job descriptions, salary schedules, and benefit documents.
- Data compilation including job comparability, range structure analysis, benefit data, and related survey information.

He has conducted over a hundred compensation surveys including recent surveys for the cities of Anaheim, Temple City, Ketchikan, Laguna Hills, Reno, Sacramento, Stockton, and Sunnyvale. He has also worked with a number of special districts including Olivenhain Municipal Water District, Otay Water District, and Monterey Regional Water Pollution Control Agency. Mr. McMurdo holds a Bachelor of Science degree in Business Administration from California State University, Sacramento. His course work emphasized human resource management.

Rachel Adams, Consultant

Ms. Adams is a Consultant with Ralph Andersen & Associates and has extensive data collection and research experience. She serves as a staff consultant on the full range of human resources projects. Her experience includes participation in classification studies and conducting large and complex compensation surveys. Ms. Adams' expertise includes:

- Participation in classification job audits and development of classification recommendations and class specifications.
- Collection and analysis of labor market salary and benefit data.
- Development of salary recommendations.

Ms. Adams holds a Bachelor of Arts degree in International Relations and Spanish and a minor in Mathematics from Calvin College.

Additional firm resources, including support staff and project consultants, will be available to ensure successful and timely completion of the study.

4 – Work Plan and Methodology

Ralph Andersen & Associates will apply several technical and administrative methodologies in creating the City's updated classification plan. An overview of all key methodologies is described below.

Background Data Analysis

The consultant team will identify a wide range of background data that will be collected from the City as part of the study. The consultant team will provide the City with a complete list of background needs upon initiation of the project.

Materials collected and reviewed during this initial stage of the project will, at a minimum, include:

- Organization charts
- Existing class specifications
- Budgets
- Current pay plan and related salary schedules
- Benefits summaries
- Memorandums of Understanding
- Relevant administrative rules and procedures.

These materials provide an understanding of the City's personnel system and of current applicable policies and procedures.

Job Analysis Questionnaires

Project consultants will distribute a Job Analysis Questionnaire (JAQ) to all employees included in the classification analysis. The questionnaire provides an opportunity for employees to fully describe the duties and responsibilities of their position. The questionnaire is also designed to record data regarding other job related information such as the knowledge, skills, abilities, education, and physical requirements necessary to perform the work, as well as supervisory and managerial responsibilities.

Each questionnaire will be reviewed by the employee's supervisory and managerial staff to ensure completeness and accuracy. Once completed, the questionnaires will be forwarded to the consultants for examination prior to the job analysis interviews. The questionnaire will be distributed and explained in detail during an employee briefing session at the initiation of the project. Appendix B includes a sample Job Analysis Questionnaire, however, all questionnaires used by Ralph Andersen & Associates can be tailored to each specific client and study.

Job Analysis Interviews

As a supplement to the questionnaires, project consultants will conduct interviews with a high sampling of employees included in the classification study. This will ensure that the consultants

are able to obtain information regarding any existing job classification issues as well as confirm the job duties and tasks performed.

Project Tasks

Task 1 – Project Kick-off Meetings

The consultants will begin all administrative and coordinative efforts in support of the project initiation meetings and briefings. Among other things, this will include:

- Preparation of a project schedule
- Identification and review of background data including existing class specifications, organization charts, employee listings, salary schedules, and related information
- Identification of scheduling parameters for meetings and interaction with various City employee groups.

This initial step in the study process will be used to identify significant classification concerns that should be clarified during the initial meeting or addressed during the course of the study.

The consultants will meet with the City's Project Manager and other staff as appropriate to ensure a full understanding of project objectives and deliverables. The project work plan and schedule will be adapted to achieve the objectives.

Task 2 – Employees Complete Questionnaires

The JAQ provides employees with an opportunity to describe the duties and responsibilities of their positions with an emphasis on job related information such as knowledge, skills, abilities, and physical capabilities required to perform the work assigned. Space is also provided on the questionnaire for employees to make any additional comments they wish. The completed questionnaires are reviewed by supervisory and managerial staff, with space provided for their comments. Appendix B includes a sample JAQ which will be reviewed with the project committee before distribution to employees.

Task 3 – Conduct Job Analysis Interviews

Prior to conducting interviews, the consultants will thoroughly review the completed questionnaires. The consultants will evaluate position duties and responsibilities, classification series, class titles, job families, reporting relationships, and internal relationships. Based on this preliminary analysis, the project team will identify areas of concern that will be clarified or probed during the job analysis interviews.

A high percentage of employees will be included in the interviews including single position classes, issue areas, and employees requesting an interviews. The consultants will assume responsibility for the preparation of the employee interview schedule. The City's Project Manager, or designee, will be responsible for scheduling interview rooms, notifying employees, and related coordinative activities.

Task 4 – Prepare and Review Preliminary Classification Report

With the completion of the employee interviews, a preliminary classification report will be prepared. Key components of the preliminary report will include:

- Identification of all key issues identified in the classification analysis
- Recommended job titles
- Preliminary employee allocations.

In preparing the preliminary classification report, each position is analyzed according to the criteria set forth at initial review meetings. Such criteria typically will include factors relating to job knowledge, experience, training, decision making, management control, working conditions, and outside contacts. Like positions are grouped into tentative classes forming the basis for initial class definition.

The preliminary classification report will be reviewed with key management staff prior to preparing class specifications. Because the concepts provide the foundation for the resulting classification plan, management review of the recommendations in their respective areas of responsibility is essential.

Task 5 – Prepare Class Specifications

Once the preliminary classification recommendations have been reviewed, the project consultants will revise, update, or create new class specifications based on the issues identified in previous tasks. The City's current job description format will be maintained if appropriate. The class specifications will be drafted and undergo a management/employee review process to ensure they accurately and adequately describe the scope of responsibilities. Once finalized, they will be provided to the City in both an electronic and hard-copy format.

Task 6 – Undertake Management/Employee Review Process

As an important component of the overall classification study, the project consultant team will provide additional opportunities for employee participation and input through the conduct of an employee review process. These steps will (1) build and facilitate the City's understanding of the newly developed classification plan; (2) enhance employee commitment and understanding of the recommended system by giving each employee the opportunity to comment on the system; and (3) ensure that the consultants receive as much information as possible regarding the nature and responsibilities of the various positions in order to make appropriate and equitable final classification recommendations. The various subtasks within this portion of the project are as follows.

Task 6.1 – Distribute class specifications to all employees included within the study scope – Each employee will receive an individual copy of the specification for the class to which his/her position has been allocated along with a Position Allocation Notice and Employee Review Form. This will provide employees with an opportunity to review and comment on their proposed classification and allocation. These comments will then be forwarded to management for review and comment.

Task 6.2 – Review written comments received from employees – All written comments or suggestions from employees regarding the recommended class plan will be thoroughly reviewed and analyzed by the project consultants. Based upon written responses received, the consultant team will incorporate appropriate suggested revisions into the final classification plan.

Task 6.3 – Conduct follow-up telephone interviews as necessary – Based upon the analysis of written comments forwarded to the project consultants and where consultant staff needs further information prior to finalizing recommendations, follow-up

interviews will be conducted by the project consultants with individual employees. This step will further clarify and refine any remaining problems or issues.

Task 7 – Finalize the Classification Recommendations

With the completion of the employee appeal process, the consultants will finalize all classification study recommendations. Supporting the finalization of the classification plan, each employee who submitted a notice for review will receive a direct response from the project consultants. This response will specifically outline the consultant's understanding of the employee's concern, specify the steps taken to resolve the concern, and indicate to the employee the substance of the consultant's final recommendation.

Task 8 – Prepare and Submit Final Report

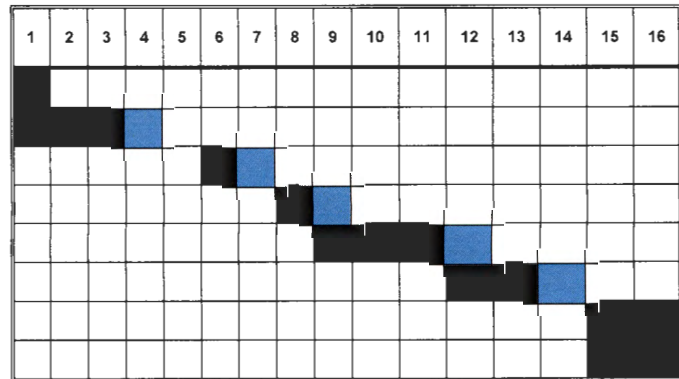
The Final Reports will incorporate any appropriate revisions identified and submitted during the review of draft reports. The submittal of final reports will also include on-site presentations to managers, employees, and City Council.

5 – Time Schedule

City of Merced

Projects of this nature are highly sensitive. Because of this sensitivity and the anxiety experienced by many employees when going through this type of process, it is beneficial to complete the analysis in the most expedient manner feasible. Assuming full cooperation of the City and the survey agencies, our project schedule assumes that all study activities will be completed within sixteen (16) weeks.

- Task 1-Conduct project initiation meetings*
- Task 2-Employees complete questionnaires
- Task 3-Conduct job analysis interviews*
- Task 4-Prepare and review preliminary classification report
- Task 5-Prepare class specifications
- Task 6-Undertake review process
- Task 7-Finalize classification plan
- Task 8-Prepare and present final report*



* On-site meeting
Blue denotes project milestones

6 – Project Fee

The total fixed cost (not to exceed cost) for professional service fees and expenses to conduct the classification study, as proposed, amounts to \$72,600. The cost of professional services and expense reimbursement is based upon the project as described in the work plan, and is a “fixed fee” regardless of which consultant performs the task and/or the number of hours needed to complete a particular element of the study. The table provided below has a breakdown of the total fixed cost by professional services and expense reimbursement:

Professional Services	\$62,800
Expense Reimbursement*	\$9,800
Total Fixed Cost	\$72,600

** Includes clerical services, copying/printing, postage/delivery, long distance telephone, transportation, lodging, meals, and related items.*

The costs outlined assume four (4) separate field trips to the City of Merced to conduct study-kick off meetings, interviews, and report presentations. Reviews of preliminary and draft documents can also be accomplished by video or teleconference.

If additional on-site meetings are required, they would be billed at a reduced hourly billing rate of \$125/hour, to a maximum of \$1,250/day, plus expense reimbursement.

If the scope of the analysis creates budget problems for the City, or if additional analysis is desired, we are willing to review the work plan and adjust it and the cost so that it is mutually satisfactory.

Appendix A

Five Year Client Listing

Appendix A

Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Cities			
City of Anaheim 200 S. Anaheim Blvd. Anaheim, CA 92805	Classification & Compensation Study for Miscellaneous Management Positions	Kristine Ridge Human Resources Director	(714) 765-5258 kridge@anaheim.net
City of Antioch 200 H Street Antioch, CA 94509	Classification & Compensation Study	Deborah McHenry Human Resources Director	(925) 779-7021 dmchenry@ci.antioch.ca.us
City of Arcadia 240 W. Huntington Drive Arcadia, CA 91066	Total Compensation Study; Update Total Compensation Study; Technical Assistance Classification & Compensation Study	Tracey Hause Administrative Services Director	(626) 574-5425 thause@ci.arcadia.ca.us
City of Auburn 1225 Lincoln Way Auburn, CA 95603	Classification & Compensation Study; Technical Assistance	David Mackowiak Human Resources Practitioners	(530) 534-3071 davidhrp@msn.com
City of Camarillo 601 Carmen Drive Camarillo, CA 93010	Classification & Total Compensation Study	Yolanda Kueny Deputy Director, Human Resources	(805) 388-5310 ykueny@ci.camarillo.ca.us
City of Carson 701 E. Carson Street Carson, CA 90749	Total Compensation Study	Gail McMahon Director of Human Resources and Risk Management	(310) 952-1736 gmcMahon@carson.ca.us
City of Ceres 2720 Second Street Ceres, CA 95307	Classification & Total Compensation Study; Technical Assistance	Keith Howes Human Resources Manager	(209) 402-9406 khleadership@gmail.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Concord 428 J Street, Ste. 400 Sacramento, CA 95814	Police Officers Association (POA) Compensation Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Davis 428 J Street, Ste. 400 Sacramento, CA 95814	Fire Management Compensation Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Elk Grove 8401 Laguna Palms Way Elk Grove, CA 95758	Classification & Total Compensation Study	Jeannine Seher Human Resources Manager	(916) 478-2226 jseher@elkgrovecity.org
City of Escondido 201 N. Broadway Escondido, CA 92025	Multiple classification and compensation studies of various employee groups since 2001	Sheryl Bennett Human Resources Director	(760) 839-4587 sbennett@ci.escondido.ca.us
City of Fairfield 1000 Webster Street Fairfield, CA 94533	Compensation Studies for Police and Fire Classes	Steve Janice Employee Relations Manager	(707) 428-7758 sjanice@ci.fairfield.ca.us
City of Fresno 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Fresno 2600 Fresno Street, Room 1070 Fresno, CA 93721	Classification & Compensation – Mid-Management Job Classes	Jeff Cardell Director of Personnel Services	(559) 621-6964 Jeffrey.Cardell@fresno.gov
City of Hayward 777 B Street Hayward, CA 94541	Comprehensive Compensation Analysis – HAME Survey Unrepresented Classes	Vanessa Lopez Senior Human Resources Analyst	(510) 583-4566 Vanessa.lopez@hayward-ca.gov
City of Hercules	Classification Study for 3 Positions	Jenny E. Smith Human Resources Specialist	(510) 799-8214 jenny.smith@ci.hercules.ca.us
City of Hermosa Beach 1315 Valley Drive Hermosa Beach, CA 90254	Classification and Compensation Study City Council Compensation Survey	Diane Strickfaden Assistant to the City Manager	(310) 318-0202 dstrickfaden@hermosabch.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Irwindale 5050 North Irwindale Avenue Irwindale, CA 91706	Classification and Compensation Study	Mary Hull Human Resources Manager	(626) 430-2204 mhull@IrwindaleCA.gov
City of Kenai 210 Fidalgo Avenue Kenai, AK 99611	Classification Study	Christine Cunningham Assistant to the City Manager	(907) 283-8223 ccunningham@ci.kenai.ak.us
City of Ketchikan, AK 334 Front Street Ketchikan, AK 99901	Classification & Compensation Study Technical Assistance Classification and Compensation - Technical Assistance Citywide Compensation Survey	Marie Miller Human Resources Manager	(907) 228-5623 mariem@city.ketchikan.ak.us
City of Laguna Hills 24035 El Toro Road Laguna Hills, CA 92653	Compensation Study Compensation and Limited Class Study	Don White Assistant City Manager	(949) 707-2610 dwhite@ci.laguna-hills.ca.us
City of Lake Forest 25550 Commercentre Drive, Suite 100 Lake Forest, CA 92630	Professional Human Resources Consulting Services Pay-for-Performance Evaluation Technical Assistance Compensation Survey Update Partial Classification Review and Full Compensation Study City Manager Survey	Debra Rose Director of Management Services	(949) 461-3414 drose@lakeforestca.gov
City of Lemoore 119 Fox Street Lemoore, CA 93245	Classification & Compensation Study	Janie Venegas, CMC City Clerk/Human Resources Manager	(559) 924-6705 jvenegas@lemoore.com
City of Manhattan Beach 1400 Highland Avenue Manhattan Beach, CA 90266	Total Compensation Survey	Janna M. Payne Human Resources Consultant	(310) 802-5255 jpayne@citymb.info

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Menlo Park 428 J Street, Ste. 400 Sacramento, CA 95814	Survey Analysis Police Supervisory Association (PSE) Compensation Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Milpitas 455 East Calaveras Blvd. Milpitas, CA 95035	Classification and Compensation Study	Tina Murphy Human Resources Director	(408) 586-3086 tmurphy@ci.milpitas.ca.gov
City of Modesto 428 J Street, Ste. 400 Sacramento, CA 95814	Citywide Survey Update (2015)	Joseph P. Lopez Assistant City Manager	(209) 571-5809 joelopez@modestogov.com
City of Modesto 1010 10 th Street Modesto, CA 95354	City-wide Compensation Survey Fire Study Survey Update Police Fire Update 2015	Joe Lopez Human Resources Director	(209) 571-5126 joelopez@modestogov.com
City of Norwalk 12700 Norwalk Blvd. Norwalk, CA 90650	Total Compensation Study	Patrick Matson Senior Human Resources Analyst	(562) 929-5717 pmatson@norwalkca.gov

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Palo Alto 428 J Street, Ste. 400 Sacramento, CA 95814	Total Compensation Study Compensation Study – UMPAPA Police Management Survey Dispatch Data Review Compensation Survey – Utility Systems Operators Compensation Survey – Fire Chief Compensation Survey – Director of Utilities POA Compensation Review (2015) Compensation Survey – SEIU Fire Chief Association Survey – 2016 Compensation Survey – Gas Technician	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Palo Alto 250 Hamilton Avenue Palo Alto, CA 94303	Classification and Compensation	Rumi Portillo Chief People Officer	(650) 329-2376 rumi.portillo@cityofpaloalto.org
City of Pleasant Hill 100 Gregory Lane Pleasant Hill, CA 94523	Classification & Compensation Study	Andrew Murray Assistant City Manager	(925) 671-5284 amurray@pleasanthillca.org
City of Reno, NV P.O. Box 1900 Reno, NV 89505	Classification & Compensation Study	Renee Rungis Human Resources Director	(775) 334-2008 rungisr@ci.reno.nv.us
City of Richmond, CA 350 Sansome Street, Suite 300 San Francisco, CA 94104	Compensation and Classification Study – Library, Business and Finance, and Clerical Positions	Genevieve Ng Senior Labor Counsel	(415) 678-3830 gng@publiclawgroup.com
City of Rocklin, CA 3070 Rocklin Road Rocklin, CA 95677	Compensation Study	Michael Green Human Resources Manager	(916) 625-5055 michael.green@rocklin.ca.us

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Sacramento, CA 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Services Police Officers Association Arbitration	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Sacramento 915 I Street Sacramento, CA 95814	Fire Survey Update Salary Survey: Local 39 & Local 447 Utilities Management Organization and Classification Review Compensation Survey Police Officers Association Survey (2016 Update)	Shelley Banks-Robinson Labor Relations Manager	(916) 808-5541 SMBanks-Robinson@ cityofsacramento.org
City of San Pablo 13831 San Pablo Ave. San Pablo, CA 94806	Classification & Compensation Study – 4 Non-sworn Police Classifications	Tina Gallegos Asst. to the City Manager	510-215-3002 tinaG@sanpabloca.gov
City of Santa Clara 1500 Warburton Avenue Santa Clara, CA 95050	Total Compensation Survey for IAFF, POA, Non-Sworn Public Safety, and AFSCME	Julia Hill Assistant Director of Human Resources	(408) 615-2161 JHill@santaclaraca.gov
City of Shoreline 17500 Midvale Ave. N Shoreline, WA 98133	Compensation and Classification Study	Paula Itaoka Human Resources Director	206-801-2241 pitaoka@shorelinewa.gov
City of Signal Hill 2175 Cherry Avenue Signal Hill, CA 90755	Compensation Study	Hannah Shin-Heydorn Deputy City Manager	(562) 989-7375 hshinheydorn@cityofsignalhill.org
City of Simi Valley and Ventura County Waterworks District No. 8 2929 Tapo Canyon Road Simi Valley, CA 93063	Citywide Classification and Compensation Study and Management-level Organizational Structure Review	Elizabeth Foushee Deputy Director/Human Resource	(805) 583-6741 EFoushee@simivalley.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of South Lake Tahoe 1901 Airport Road, S Lake Tahoe, CA 96150	Classification & Compensation Study; Ongoing Technical Assistance	Janet Emmett Human Resources Manager	(530) 542-6052 jemmett@cityofslt.us
City of Stockton 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Survey – Deposition 2013 Survey Data Update 2014 Utilities Class & Comp 2015 Compensation Survey Sworn Police Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
City of Stockton 22 E. Weber Ave., Suite 150 Stockton, CA 95202	Fire Update 2015 Department Head Survey Update	Teresia Zadroga-Haase Human Resources Director	209-937-8344 Teresia.Haase@stocktongov.com
City of Suisun City 701 Civic Center Blvd. Suisun City, CA 94585	Classification & Total Compensation Study	Suzanne Bragdon City Manager	(707) 421-7300 sbragdon@suisun.com
City of Sunnyvale P.O. Box 3707 Sunnyvale, CA 94088	Annual Salary Survey for COA, PSOA, and SEA classes City Manager Survey Communications Officers' Association Survey – Dispatcher Technical Assistance (Master Contract) Annual PSOA Survey Survey Update – COA (Dispatchers)	Tammy Parkhurst Human Resources Manager	(408) 730-7498 tparkhurst@ci.sunnyvale.ca.us
City of Temple City 9701 Las Tunas Drive Temple City, CA 91780	Classification and Compensation Study	Tracey L. Hause Administrative Services Director	(626) 285-2171 ext. 2314 thause@templecity.us
City of Vacaville 650 Merchant Street Vacaville, CA 95688	Technical Assistance on various classification and compensation matters	Chas Howard Human Resources Manager	(707) 449-5136 choward@ci.vacaville.ca.us

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Vallejo 428 J Street, Ste. 400 Sacramento, CA 95814	Sworn Police Retiree Health Survey	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
Counties			
Napa County 1195 Third Street Napa, CA 94559	Classification & Compensation Study for Management Employees Compensation Study for Represented Employees Compensation Study for Sworn Management Employees Probation Officer Arming Survey Deputy Sheriffs' Association 2013 Survey Fire Project – Technical Assistance PSE Survey Update (SEIU) HHSA Classification Analysis Management Compensation Plans Compaction Study Between Line Staff & Supervisory Classification Correctional Officer Salary Review Emergency Response Worker & Mental Health Worker Class Review Permit Technician & Plan Examiner Class Series Reviews Engineer Series Compensation Study for Health Officer and Director of Public Health Management Survey Compensation Study – Board of Supervisors Accountant/Auditor Classification Study	Suzanne R. Mason Director of Human Resources	(707) 253-4303 suzanne.mason@countyofnapa.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Sacramento County 700 H Street Sacramento, CA 95814	Deputy Sheriff Arbitration Support; Compensation Analyses Involving Unrepresented County Classifications Deposition (Porter Scott)	Mark Norris Administrator, Internal Services Agency	(916) 874-7097 norrism@saccounty.net
Sacramento County 700 H Street Room 4667 Sacramento, CA 95814	Police Management Arbitration	Robert Bonner Director of Labor Relations	(916) 874-7085 bonnerr@saccounty.net
San Bernardino County 100 Wilshire Blvd., 4 th Floor Santa Monica, CA 90401	Compensation Survey	Marianne S. Mortimer Stradling Attorneys at Law	(424) 214-7014 MMortimer@SYCR.com
San Joaquin County 24 South Hunter Street Stockton, CA 95202	Multiple classification and compensation studies of various employee groups conducted since 1998	Marilyn Maskell Principal Human Resources Analyst	(209) 468-3276 mmaskell@sjgov.org
San Luis Obispo County 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Survey Update Classification and Compensation (27 positions) Management Compensation Study – Phase III SLOCEA Survey – Phase V Compensation Study	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
San Luis Obispo County 1055 Monterey Street, Suite D250 San Luis Obispo, CA 93408	Technical Assistance – Market Agencies	Megan Fisher Employee Relations Manager	(805) 781-5971 mmfisher@co.slo.ca.us
San Mateo County 455 County Center, 5 th Floor Redwood City, CA 94063	Salary Survey (5 Classes)	Donna Vaillancourt Human Resources Director	(650) 363-4132 dvaillancourt@smcgov.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Solano County 675 Texas Street Fairfield, CA 94533	Compensation Policy Analysis Compensation and Benefit Survey IT Classification and Compensation Salary Surveys – 7 Positions	Marc A. Fox Director of Human Resources	(707) 784-2552 MAFox@SolanoCounty.com
Sonoma County 575 Administration Drive #116B Santa Rosa, CA 95403	Regional Parks – 5 Classifications Class & Partial Compensation Study Probation Department Classification & Compensation Study Total Compensation Survey – Phase I (18 Job Classes) Total Compensation Survey – Phase II (141 Job Classes) Total compensation Survey – Phase III (9 Water Agency Job Classes)	Lisa Conner Human Resources Analyst III	(707) 565-5119 Lisa.conner@sonoma-county.org
Sonoma County 428 J Street, Ste. 400 Sacramento, CA 95814	Class Matching	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
Stanislaus County 428 J Street, Ste. 400 Sacramento, CA 95814	Countywide Total Compensation Survey (Phase I)	Mark Gregersen Principal Consultant	(916) 258-8807 mgregersen@publiclawgroup.com
Water Districts			
Coachella Valley Water District 75515 Hovley Lane East Palm Desert, CA 92211	Comprehensive Compensation and Classification Survey	Kris Hopping, SPHR Senior Human Resources Specialist	(760) 398-2661, ext. 2489 khopping@cvwd.org
Irvine Ranch Water District 15600 Sand Canyon Avenue Irvine, CA 92618	Compensation Policy Review 2014/2015 Compensation Survey	Gretchen C. Ronin Human Resources Manager	(949) 453-5438 Maswadeh@irwd.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Mesa Water District 1965 Placentia Avenue Contra Costa, CA 92627	Benefits Benchmark Survey Classification and Compensation Study	Coleen L. Monteleone Administrative Services Manager	(949) 631-1205 coleenm@mesawater.org
Monterey Regional Water Pollution Control Agency	Base Salary Compensation Survey	Leara Sampson Human Resources Administrator	(831) 645-4650 leara@mrwpca.com
Olivenhain Municipal Water District 1966 Olivenhain Road Encinitas, CA 92024	Total Compensation Study Compensation Survey	Thomas Wood Human Resources Manager	(760) 632-4211 twood@olivenhain.com
Otay Water District 2554 Sweetwater Springs Spring Valley, CA 91978	Total Compensation Study Compensation Study Survey Data Analysis	Kelli Williamson Human Resources Manager	(619) 670-2227 kwilliamson@otaywater.gov
Rincon del Diablo Municipal Water District 1920 North Iris Lane Escondido, CA 92026	Classification and Compensation Study	Tish Berge Director of Administration and Finance	(760) 745-5522 x500 tberge@rinconwater.org
Santa Ana Watershed Project Authority 11615 Sterling Ave. Riverside, CA 92503	Classification and Compensation Study	Celeste Cantu General Manager	(951) 354-4247 ccantu@sawpa.org
Santa Fe Irrigation District P.O. Box 409 Rancho Santa Fe, CA 92067	Compensation Survey	Jessica Miles Human Resources Administrator	858-227-5780 jmiles@sfidwater.org
Scotts Valley Water District 2 Civic Center Drive Scotts Valley, CA 95066	Compensation Survey Compensation Survey (2 Positions)	Piret Harmon General Manager	(831) 438-2363 pharmon@svwd.org
Sonoma County Water Agency (De Loach and Associates)	Limited Classification and Compensation	Robert A. DeLoach President	(909) 758-0273 Robertadeloach1@gmail.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Soquel Creek Water District 5180 Soquel Drive Soquel, CA 95073	Compensation Study	Michelle Boisen Financial and Business Services Manager	(831) 475-8500 michelleb@soquelcreekwater.org
Sunny Slope Water Company 1040 El Campo Drive Pasadena, CA 91107	Total Compensation Study	Michael Hart Vice President & General Manager	(626) 795-4163 sswc01@sbcglobal.net
West Basin Municipal Water District 17140 S. Avalon Blvd., Suite 210 Carson, CA 90746	Classification and Compensation Survey	Michelle Green Human Resources Officer	(310) 660-6228 michelleg@westbasin.org
Zone 7 Water Agency 100 N. Canyon Pkwy. Livermore, CA 94551	Total Compensation Studies	Sylvia Seaborn Human Resources Manager	(925) 224-7730 ext. 228 sseaborn@zone7water.com
Other Districts and Authorities			
Alameda County Housing Authority 22941 Atherton Street Hayward, CA 94541	Management Compensation Study	Thomas Makin Deputy Director for Operations	(510) 727-8516 TomM@haca.net
Central Contra Costa Sanitary District	Compensation Survey	Eddie Kreisberg Meyers Nave 555 12th Street, Suite 1500 Oakland, CA 94607	(510) 351-4300 elk@meyersnave.com
Conejo Recreation and Park District 403 West Hillcrest Drive Thousand Oaks, CA 91360	Total Compensation & Limited Classification Study Classification Study (Pool Manager and Assistant Pool Manager) Technical Assistance 2015 Technical Assistance 2016 Technical Assistance 2017	Phyllis Bluhm Human Resources Supervisor	(805) 381-1221 pbluhm@crpd.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Contra Costa County Employees' Retirement Association 1355 Willow Way Suite 221 Concord, CA 94520	Compensation Analysis	Marilyn Leedom Retirement Chief Executive Officer	(925) 521-3960 mleedom@ret.cccounty.us
Contra Costa County Schools Insurance Group 550 Ellinwood Way Pleasant Hill, CA 94523	Total Compensation Studies; Technical Assistance in classification and compensation matters Classification for Executive Director	Erica Williamson Human Resources Manager	(866) 922-2744 ewilliamson@cccsig.org
Emerald People's Utility District 33733 Seavey Loop Road Eugene, OR 97405	COLA Analysis	Alice Schroeder, SPHR Human Resources Coordinator	(541) 744-7457 alice@epud.org
Hanson Bridgett LLP Wood Island 80 E. Sir Francis Drake Blvd., Suite 3E Larkspur, CA 94939	Expert Witness	Raymond F. Lynch Partner	(415) 995-5055 rlynch@hansonbridgett.com
Jurupa Community Services District 11201 Harrel Street Mira Loma, CA 91752	Limited Compensation Study	Todd Corbin General Manager	(951) 685-7434 tcorbin@jcsd.org
Kern County Employees' Retirement Association 11125 River Run Blvd. Bakersfield, CA 93311	Phase I – Compensation Study – Chief Investment Officer Phase II – Compensation Study (All Job Classes)	Gloria M. Dominguez Executive Director	(661) 381-7700 dominguezg@co.kern.ca.us
Menlo Park Fire Protection District 170 Middlefield Road Menlo Park, CA 94025	Compensation Survey	Brenna Rowe Human Resources Manager	(650) 688-8400 browe@menlofire.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Meyers Nave – Wulfman 555 12 th Street, Suite 1500 Oakland, CA 94607	Deposition	Samantha W. Zutler Senior Associate	(510) 808-2000 szutler@meyersnave.com
Midpeninsula Regional Open Space District 330 Distel Circle Los Altos, CA 94022	Classification & Compensation Study; Technical Assistance in classification and compensation matters	Sally Rice Assistant General Manager	(650) 691-1200 srice@openspace.org
North Bay Schools Insurance Group 380A Chadbourne Road Fairfield, CA 94534	Total Compensation Study	Jan DeGracia Executive Director	(707) 428-1830 ext. 105 jand@nbsia.org
Orange County Fire Authority 1 Fire Authority Road Irvine, CA 92602	Classification and Compensation Compaction Analysis of Executive Positions Compensation Survey for Medical Director Urban Search and Rescue Class Study Environmental Health & Safety Specialist Class Study	Debbie Casper, C.P.M., CPPB Purchasing & Materials Manager	(714) 573-6641 debbiecasper@ocfa.org
Sacramento Metropolitan Air Quality Management District 777 12 th Street, 3 rd Fl. Sacramento, CA 95814	Classification and Compensation Study	Patrick Smith Administrative Services Program Supervisor	(916) 874-4800 psmith@airquality.org
Sacramento County Employees' Retirement System 980 9 th Street, Suite 750 Sacramento, CA 98512	Total Compensation Study of Five SCERS Positions Compensation Survey Total Compensation Study of Eight Positions 2016 Survey Update	Kathy Ragalia Chief Operations Officer	(916) 874-9119 regaliak@saccounty.net

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Housing Authority of the County of Santa Clara 505 West Julian Street San Jose, CA 95110	Compensation Study for the position of Assistant Housing Programs Director Compensation Study for the position of Housing Programs Manager Compensation Study for the Housing Programs Staff (3 positions) Compensation Study for the position of Executive Director Organization Review of the Housing Programs Department	Shelley Giancola Human Resources Manager	(408) 993-3031 shelleyg@hacsc.org
Schools Insurance Authority 9805 Goethe Road Sacramento, CA 95827	Classification and Compensation Study Compensation Study Executive Director Survey	Martin Brady Executive Director	(916) 364-1281 mbrady@sia-jpa.org
Tahoe Truckee Unified School District 11603 Donner Pass Road Truckee, CA 96161	Management Classification and Compensation Study	Thomas Gemma Executive Director of Administrative Services	(530) 582-2500 tgemma@ttusd.org
Twin Rivers Unified School District 3222 Winona Way North Highlands, CA 95660	Compensation and Classification Study for Twin Rivers School Police Association	Gina Carreon Assistant Superintendent Human Resources	(916) 566-1600 ext. 50379 Gina.Carreon@twinriversusd.orgp
West Bay Sanitary District 500 Laurel Street Menlo Park, CA 94025	Job Classification and Total Compensation – Technical Assistance	Phil Scott District Manager	(650) 321-0384
Whatcom Transportation Authority 2011 Young Street Bellingham, WA 98225	Compensation Workshop and Analysis; Technical Assistance Compensation Plan	Kimberly Somers	(360) 738-4588 kimberlys@ridewta.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Yolo County Housing Authority 1224 Lemen Avenue Woodland, CA 95776	Compensation Study for Grant Writer Classification/Position	Executive Director's Office (contact was David Serena, Executive Director)	(530) 662-5428

Appendix B

Job Analysis Questionnaire



JOB ANALYSIS QUESTIONNAIRE

DUE DATES		INTERVIEW REQUEST	
Return to Supervisor: _____		Would you like to be interviewed regarding your classification? Yes ☐ No ☐ If yes, Individual Interview ☐ Group Interview ☐	
Return to Human Resources: _____		If yes, indicate reason and preference: Title Change ☐ Salary Issue ☐ Other ☐	

I - IDENTIFYING INFORMATION

- | | | |
|----|--|--|
| A. | Name _____ | |
| | (Last) | (First) (Middle Initial) |
| B. | Department _____ | Division _____ |
| C. | Current Classification Title _____ | |
| D. | Length of Time in Current Position _____ | _____ |
| | (Years) | (Months) |
| E. | Previous Title with Organization _____ | _____ |
| | | Length of Time (Years/Months) |
| F. | Total Length of Time with Organization _____ | _____ |
| | (Years) | (Months) |
| G. | Assigned Hours/Week _____ | ; from _____ am/pm to _____ am/pm |
| H. | Assigned Days/Week _____ | ; from _____ to _____ |
| I. | Work Address _____ | Telephone Number (____) _____ Ext. _____ |
| J. | Name of Immediate Supervisor _____ | Telephone Number (____) _____ Ext. _____ |
| K. | Classification of Immediate Supervisor _____ | |

II - PURPOSE OF YOUR POSITION

Describing your job as you would to someone not familiar with your work, briefly summarize the overall purpose(s) of your position, as you understand it, and the key result that the job is expected to achieve.

III - IMPORTANT AND ESSENTIAL DUTIES

Listing the most important duties first, describe the major duties performed by the position. A duty is an activity performed to achieve the purpose or objectives of the job. A duty is a significant part of a functional area and consists of the performance of one or more tasks. Start each duty statement with a verb such as prepare, maintain, calculate, collect, compile, clean, repair, or other similar action word.

Respond based on actual job duties and responsibilities. Describe the job responsibilities/duties as they exist now. In other words, tell us what you are actually doing in the job – this may or may not differ from what your current job description states. NOTE: This is NOT an evaluation of your personal background or performance in the job.

Be objective and accurate. Try not to understate or inflate the job. Base your responses on the typical duties and responsibilities of the job under normal conditions, not under unusual circumstances or temporary assignments.

Frequency Code: D (Daily), W (Weekly), M (Monthly), Q (Quarterly), S (Semi-Annually), Y (Yearly)

% of Total Job: Assuming all duties listed encompass 100% of the total job, give a best estimate of the approximate percentage of total job that each duty (or group of related duties) represents. The total of all duty statements must equal 100%.

IMPORTANT AND ESSENTIAL DUTIES		Frequency Code	Percent of Total Job
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

IMPORTANT AND ESSENTIAL DUTIES

		Frequency Code	Percent of Total Job
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			

IV - DUTIES ADDED TO YOUR JOB IN THE LAST YEAR

Identify each duty (by number) in Section III that has been added to your job in the last year and provide a brief explanation as to why this duty was added to your job.

Duty #	Brief Explanation

V - JOB RELATED QUALIFICATIONS

JOB RELATED QUALIFICATIONS: Please list the knowledge, skills and abilities that are:

1. **Necessary** for the successful performance.
2. **Cannot be learned** in a brief training or orientation session (1 week or less).
3. **Required by the job**, not ones you have acquired on the job.

DEFINITIONS

KNOWLEDGE is a body of information that applies directly to the performance of a function or duty (e.g., Knowledge of accounting principles and practices.)

SKILL is a developed ability to use knowledge effectively or dexterity/coordination in the performance of physical tasks (e.g., Operate word processing equipment).

ABILITY is the competence or capability to perform an observable duty and usually results in an observable product (e.g., Prepare clear and concise reports).

Please list the knowledge, skills and abilities that are **essential** for the position being described. The knowledge, skills and abilities listed under this section should be linked with the essential duty statements.

ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES STATEMENTS

**Duties from
Section III**
(Please identify the
duties from Section
III by Number)

1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		

ESSENTIAL KNOWLEDGE, SKILLS, AND ABILITIES STATEMENTS

**Duties from
Section III**
(Please identify the
duties from Section
III by Number)

12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		
21.		
22.		

VI - COMPUTER SKILLS

What computer skills are required to perform your job? ***Remember this is not necessarily the level of skills you possess, but the level required in the normal performance of your job.*** Check as many boxes that apply.

- ☐ Work requires typical office computing software including the use of e-mail, spreadsheet, word processing, presentation, and internet applications.
- ☐ Work involves developing, maintaining, and enhancing applications. Applications may include special purpose software systems, databases, interactive-spreadsheets, data entry forms, report writers, and web-based systems.
- ☐ Work requires the maintenance, installation, and administration of operating systems including desktop computers, servers, and other hardware. Duties typically also include troubleshooting and installing computer hardware components and software applications.
- ☐ Work involves the installation, maintenance, and administration of network servers, server-based applications, network/communication hardware, and special purpose servers such as e-mail, security, internet/intranet, and related systems. Work involves both local and wide-area networks (if applicable).

VII - EDUCATION & EXPERIENCE

- A. **Education** -- What minimum level of education is needed to satisfactorily perform your job?
(Not necessarily your background.)

- | | |
|---|--|
| ☐ Read and write; no specific requirements | ☐ High school diploma or equivalent (G.E.D.) |
| ☐ Supplemental training - vocational or college level course | ☐ Formal specialized training - 2 year college program; apprenticeship/technician |
| ☐ Bachelor's or higher degree | Field of Study: _____ |

Please list any licenses, registrations, or certificates **required** for your position and the agency responsible for issuing it.

License, Certificate, Registration	Issuing Agency

- B. **Experience** -- In addition to education and training, what is the minimum required experience? _____ years.

VIII - EQUIPMENT OPERATING REQUIREMENTS

List **equipment or machines** you use in the regular course of your assigned duties that require training and skill to operate proficiently. For each item, please assign a frequency code (D, W, M, Q, S, Y) and estimate the total amount of time spent operating that piece of machinery/equipment.

MACHINE/EQUIPMENT	REQUIRED DOCUMENTATION	
	Relative Frequency	Percent of Time
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		

IX - SUPERVISION EXERCISED

- A. Do you exercise supervision over any employees? ☐ Yes ☐ No
- B. If yes, please check the definition that best describes the type of supervision you exercise and the names and classification/job titles of the employees whom you supervise. **Please attach additional pages if necessary.**

- ☐ **Technical and Functional (Lead Worker)** - You are responsible for prescribing procedures, methods, materials and formats used in recurring projects of particular area(s) of work including training other employees. In addition, you are also responsible for recurring work projects or activities involving other employees to whom you give direction and guidance including lead supervision for a project or set of work activities. You may also have responsibility for assigning, scheduling, coordinating, organizing, and directing work activities.

☐ Regular Lead

☐ Project Lead

Employee Name	Class/Job Title

- ☐ **Direct Supervision** - In addition to functional and technical supervision, you are responsible for the administration of line personnel functions including employee selection, discipline, grievances, and formal performance evaluations.

Employee Name	Class/Job Title

- C. If you checked either of the above, please indicate the nature of group supervised and the number supervised.

Full-time	Part-time	Seasonal/Temp	Volunteer

- D. Please clarify your responsibility for the following supervisory responsibilities and decisions. Check the appropriate description that relates to each applicable function you perform in your position.

Function	RESPONSIBILITY			
	Responsible for Function	Make Formal Recommendations	Provide Input	N/A
Hiring	☐	☐	☐	☐
Termination	☐	☐	☐	☐
Promotion	☐	☐	☐	☐
Performance Appraisal	☐	☐	☐	☐
Employee Discipline	☐	☐	☐	☐
Employee Counseling	☐	☐	☐	☐
Setting Goals and Objectives	☐	☐	☐	☐
Revising Procedures	☐	☐	☐	☐
Changing Policy	☐	☐	☐	☐
Training	☐	☐	☐	☐

X - CONTACTS

- A. With what individuals **inside** your organization do you have regular and frequent job related contact other than your supervisor and those you supervise? Check the type of contact, indicate the purpose(s) of the contact (a, b, c, d, e, f, g) using the codes noted below, and the relative frequency (D, W, M, Q, S, Y). You may indicate more than one "purpose of contact" as appropriate.

<u>Purpose of Contact</u>	<u>Code</u>
Provide information	a
Collect information	b
Coordinate projects, activities, etc.	c
Solve problems	d

<u>Purpose of Contact</u>	<u>Code</u>
Negotiate solutions within policy guidelines	e
Negotiate solutions involving policy changes	f
Other - specify below	g

Type of Internal Contact	Purpose of Contact	Relative Frequency
☐ Clerical/maintenance staff, other departments		
☐ Professional/technical staff, same department		
☐ Professional/technical staff, other departments		
☐ Managers, other departments		
☐ Council(s) (Type: _____)		
☐ Board(s) (Type: _____)		
☐ Commission(s) (Type: _____)		
☐ Committee(s) (Type: _____)		
☐ (Specify)		
☐ (Specify)		

- B. With what individuals **outside** your organization do you have regular and frequent contact required by the major responsibilities of your job? Check the type of contact, indicate the purpose(s) of the contact (a, b, c, d, e, f, g) using the codes noted above, and the relative frequency (D, W, M, Q, S, Y). You may indicate more than one "purpose of contact" as appropriate.

Type of External Contact	Purpose of Contact	Relative Frequency
☐ General Public		
☐ Contractors, engineers and/or developers		
☐ Vendors		
☐ Public Agencies		
☐ Consultants		
☐ Committee(s) (Type: _____)		
☐ (Specify)		
☐ (Specify)		

XI - ENVIRONMENTAL FACTORS

Please identify the **environmental factors** that you are exposed to in the course of your job and indicate the relative frequency code (see below) for each of the applicable conditions. Also, indicate from Section III the number(s) of the Duties (i.e., #3, #6) that are related to these working conditions. Please leave line blank if environmental factor is not applicable.

Frequency Codes:	I = Infrequent (less than 10%)	M = Moderate, Average (25% - 50%)
	S = Seldom, Minimal (10% - 25%)	A = Almost Always (more than 50%)

Condition	Relative Frequency				Duties
	I	S	M	A	
Outside environment; travel from site to site					
Inside environment					
Heat					
Cold					
Dampness or Chilling					
Dry atmosphere condition					
Working in confined spaces					
Working closely					
Work alone					
Irregular work hours					
Working with machinery					
Working with or in water					
Working below ground					
Work on ladders/scaffolds					
Vibration					
Noise					
Slippery/uneven surfaces					
Moving objects/vehicles					
Grease and Oils					
Radiant energy					
Electrical energy					
Explosives					
Silica, asbestos, etc.					
Dust (specify):					
Toxic Chemicals (list):					
Fumes, smoke, gases (list):					
Solvents (list):					
Exposure to poisonous animals/insects					
Stress, emergency (specify):					
Other factors not listed:					

Check the box that best describes your overall environmental working conditions:

- ☐ **General** -- Standard office/indoor setting.
- ☐ **Variable** -- Moderate exposure to conditions that may be unpleasant such as inclement weather, machine noise, or strong odors; occasional exposure to risks controlled by safety precautions.
- ☐ **Hazardous** - Infrequent or moderate exposure to risks or discomforts that are partially controlled by special safety precautions, e.g., working around machines with moving parts, with contagious diseases or irritant chemicals.
- ☐ **Significant Risk** - Continuous high risks with exposure to potentially dangerous situations requiring a range of safety or other precautions, e.g., working at great heights, under extreme conditions, subject to possible physical attack, working around high voltage.

XII - PHYSICAL FACTORS

Please identify each appropriate **physical activity** required in the performance of your job and indicate the relative frequency code (see below) for each activity. Also indicate from Section III the number(s) of the Duties (i.e., #3, #6) that are related to these physical factors. Please leave line blank if physical activity is not applicable.

Frequency Codes:	I = Infrequent (less than 10%)	M = Moderate, Average (25% - 50%)
	S = Seldom, Minimal (10% - 25%)	A = Almost Always (more than 50%)

Condition	Relative Frequency				Duties
	I	S	M	A	
Heavy lifting, 45 lbs. & over					
Moderate lifting, 15-45 lbs.					
Light lifting, under 15 lbs.					
Heavy carrying, 45 lbs. & over					
Moderate carrying, 15-45 lbs.					
Light carrying, under 15 lbs.					
Pulling					
Pushing					
Reaching					
Use of fingers					
Both hands required					
Walking					
Standing					
Sitting					
Crawling					
Kneeling					
Repeated bending					
Climbing					
Operating of motorized equipment					
Ability to discharge firearms					
Speech					
Visual requirements					
★ Near vision, i.e., 20 inches or less					
★ Mid-range, i.e., more than 20 inches and less than 20 feet.					
★ Distance, i.e., 20 feet or more					
★ Color, i.e., ability to identify and distinguish colors					
★ Depth Perception					
Repetitive motions					
Hearing requirements					
Special factors not listed:					

Check the box that best describes the overall amount of physical effort typically required by your job:

- ☐ **Standard** - Normally seated, standing or walking at will; normal physical ability to do some bending and light carrying.
- ☐ **Restricted/Mobile** - Confined to immediate work area; can only leave work station during assigned breaks.
- ☐ **Exertive** - Extensive walking, recurring bending, crouching, stooping, stretching, reaching or similar activities; recurring lifting of light or moderately heavy items.
- ☐ **Strenuous** - Considerable and rapid physical exertion or demands on the body such as frequent climbing of tall ladders, continuous lifting of heavy objects, crouching or crawling in restricted areas; exertion requires highly intense muscular action leading to substantial muscular exhaustion.

XIII - MISCELLANEOUS COMMENTS

Please provide any Miscellaneous Comments that may help clarify the duties and responsibilities of your position. Please include any specific issues associated with your job duties that you do not feel were adequately captured on this form.

[illegible]

XIV – ORGANIZATION CHART

Please attach an organization chart(s) for your work unit or division.

Please sign and date the completed questionnaire, make a copy for your files, and forward to your immediate supervisor.

Employee Signature: _____

Date: _____

Type or Print Name: _____

(This page is available as a separate online template)

IMMEDIATE SUPERVISOR REVIEW

Did the employee describe the duties and responsibilities of the position **accurately and fully**? Are there duties missing? Are there any duties listed that are not requirements of this position? Please comment. *Do not make comments regarding employee performance.*

Signature: _____ Date: _____

Type or Print Name: _____

Classification Title: _____

MANAGEMENT REVIEW

Do the preceding descriptions and comments by the employee and immediate supervisor(s) describe the position **accurately and fully**? Please comment.

Signature: _____ Date: _____

Type or Print Name: _____

Classification Title: _____