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Classification and Compensation Study

Volume I – Classification

Final Report

Eastern Municipal Water District

KOFF & ASSOCIATES

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Ms. Laura Zamora
Director of Human Resources
Eastern Municipal Water District
2270 Trumble Road
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Dear Ms. Zamora:

Koff & Associates is pleased to present the final classification and compensation reports for the study of all positions in the Eastern Municipal Water District ("District"). Volume I documents the classification study process and provides recommendations for the classification plan, and allocations of individual positions for all District employees. New class descriptions have been provided to the District for their action. Volume II, to be sent under separate cover at a later date, documents the market compensation survey, findings, and recommendations.

This first volume incorporates a summary of the study's multi-step process, which included results of written Position Description Questionnaires, interviews with employees and management, and employee 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.

Very truly yours,



Georg S. Krammer
Chief Executive Officer



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EXECUTIVE SUMMARY

Background

In April 2017, the Eastern Municipal Water District (“District”) contracted with Koff & Associates (“K&A”) to conduct a classification and total compensation study for all of the District’s classifications. All classification and compensation findings, recommendations, and options for implementations are in Volumes I and II of this report.

This classification review process was precipitated by:

- The concern of the District’s Board of Directors , 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 District to recruit and retain a high-quality staff;
- The desire 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 District; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across the District.

The goal of the classification and compensation study is to assist the District in developing a competitive pay and benefit structure, which is based upon market data, to ensure that the plan is fiscally responsible, and meets the needs of the District 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 as 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 District 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 District project team 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 an appropriate percentage of employees.
- Focus group sessions were held with several management employees to better understand some of the current challenges they may have with the classification system in terms of work assignment flexibility, operational effectiveness and whether classifications are appropriate for the work performed.
- Following the analysis of the classification information gathered, draft class concepts, specifications, and position allocations were developed for management , employee and bargaining unit review.
- After resolution of issues, including additional contacts with employees and management to gain details and clarification, appropriate modifications were made to the draft class descriptions 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



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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 District are covered in Volume II of this 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



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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 District, 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 District's changing environment and service delivery expectations, as well as being in line with the District's strategic plan. This approach resulted in recommendations to retitle classifications to more accurately reflect current responsibilities or use more contemporary titles (e.g., Communications and Control Coordinator to SCADA Systems Analyst) or to reclassify certain individuals into existing or entirely new classifications that more accurately reflect current responsibilities (e.g., some positions of Administrative Assistant to the new class of Operations Support Specialist). Detailed allocation recommendations are found in Appendix I of the report.

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 submitted to the District for their action.

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



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- 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 District. 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 District 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



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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 District (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.



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Salary Basis Test: The incumbents in a classification are paid at least \$455 per week (\$23,660 per year), not subject to reduction due to variations in quantity/quality of work performed. Note: computer professionals' salary minimum is defined in hourly terms as \$27.63 per hour.

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 times 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 District 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 District 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. Mid-Management

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 a Department Director.



E. Senior Management

- **Department Director** – Positions in this class are at the department head level and oversee, direct, and participate in all activities of the department, including short- and long-term planning, as well as the development and administration of department policies, procedures and services. Incumbents in this class are accountable for accomplishing departmental planning and operational goals and objectives and for furthering District goals and objectives within general policy guidelines. This level normally reports to the Assistant General Manager and exercises direct supervision over managerial, supervisory, professional, technical and administrative staff through subordinate levels of department management.
- **Assistant General Manager** – Positions in this class plan, oversee, and direct the staff, all operations and activities of multiple departments within an assigned branch, assuming responsibility for short- and long-term planning, as well as the development and administration of policies, procedures and services. Incumbents in this class are accountable for overseeing the complex and varied functions of the multiple departments they manage within the branch, accomplishing planning and operational goals and objectives and for furthering District goals and objectives within general policy guidelines. This level reports to the Deputy General Manager and exercises direct supervision over managerial, supervisory, professional, technical and administrative staff through subordinate levels of department management.

F. Executive Management

- **Deputy General Manager** – Positions in this class plan, oversee, and direct the staff, all operations and activities of an assigned branch, assuming responsibility for short- and long-term planning, as well as the development and administration of branch policies and procedures. Incumbents in this class provide highly complex assistance to the General Manager and are accountable for overseeing the complex and varied functions of the branch, accomplishing branch planning and operational goals and objectives and for furthering District goals and objectives within general policy guidelines. This level reports to the General Manager and exercises direct supervision over managerial, supervisory, professional, technical and administrative staff through subordinate levels of department management.
- **General Manager** – The employee has total administrative responsibility for the District and reports to the Board of Directors.

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 supervisory or advanced professional classifications. 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 Direction

Administrative direction is usually received by management classifications. Incumbents are responsible for performing diverse, specialized, and complex work involving significant accountability and decision-making responsibilities, which include developing and implementing policies and procedures for assigned programs, budget administration and reporting, and program evaluation.



E. Policy Direction

Policy direction is usually received by senior management and executive management classifications. Incumbents are accountable for accomplishing District-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 District-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 District 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 District.



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 District.

D. Negotiation with organizations from a position of authority

The employee often deals with the District’s elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of the District, 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?



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- 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, District-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 and 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 District 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 the classifications presented in Table 1. Where noted, some classifications were consolidated into the re-titled classification; in others, where there were multiple levels in the series, but no differences in work at the second or third level in the series, the series was “collapsed” into two levels (one example of this was the Customer Service Representative I/II/III series). In some cases, the “flex” designation was removed from the “I” level since that designation is a descriptive of an action taken to move classes to a higher level; those title changes are not included in this list.

Title changes are recommended to more clearly reflect the level and scope being performed, to consolidate work into broader categories that could be used District-wide, as well as establish consistency with the labor market and industry standards. Any compensation recommendations (detailed in Volume II) 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. Approximately one hundred and twenty-four (124) employees received a change in title, often because there were multiple incumbents in the classification. All recommended position allocations are presented in Appendix I, dated January 2019.

Table 1. Title Change Recommendations

Current Classification Title	Proposed Classification Title
Customer Service Field Representative I/II/Senior Meter Reader I/II	Classifications were consolidated into a single level and re-titled Meter Services Technician
Customer Service Representative I/II/III	Because there was no difference between the II and III levels, the series was collapsed into two levels titled Assistant Customer Service Advisor/Customer Service Advisor
Senior Customer Service Representative	Senior Customer Service Advisor
AMR Technician	AMI Technician
Telephone Operator	Receptionist
Financial Manager I Financial Manager II	Because there were no differences between the I and II levels, they were consolidated into a single classification titled Financial Manager
Financial Manager III	Senior Financial Manager



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Current Classification Title	Proposed Classification Title
Light Fleet Technician I/II Heavy Fleet Technician I/II	Classifications were consolidated and re-titled Fleet Services Technician I/II
Senior Heavy Fleet Technician	Senior Fleet Services Technician
Business Solutions Manager Enterprise Support Manager	Both classifications were consolidated into a single classification titled Information Technology/DevOps Manager
Programmer I/II	Applications Developer I/II
Senior Software Engineer Senior Programmer Analyst	Senior Applications Engineer
Oracle Financial Business Systems Analyst Engineering Systems Analyst	Business Systems Analyst II
Senior Business Systems Analyst	Senior Business Systems Engineer
Computer Technician I/II	Client Support Specialist I/II
Systems Administrator I/II	Information Systems Engineer I/II
Senior Database Administrator Data Modeler/Warehouse Developer Senior Network Administrator Senior Systems Administrator	Classes were consolidated into a new classification of Senior Information Systems Engineer
Quality Assurance Manager	Information Systems Manager
Supervising Maintenance and Operations Planner/Scheduler	Asset and Maintenance Operations Supervisor
Controls and Communication Systems Coordinator Controls and Communications Analyst II (some positions)	SCADA Systems Analyst
Civil Engineering Associate I/II	Assistant Engineer
Civil Engineer I/II	Associate Civil Engineer I/II
Conservation Program Specialist III	Because there was no difference between the II and III levels, the class was collapsed



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Current Classification Title	Proposed Classification Title
	into two levels and the position was re-titled Conservation Program Specialist II
Conservation Program Specialist III	Water Resources Specialist Associate I/II
Air Quality Compliance Analyst I/II CEQA/NPA Compliance Analyst I/II Environmental Compliance Analyst I/II	Classes were consolidated into the Environmental Compliance Analyst I/II
Senior Air Quality Compliance Analyst Senior Environmental Compliance Analyst	Classes were consolidated into the Senior Environmental Compliance Analyst
Cross Connection Control Coordinator II	Cross Connection Control Coordinator; series was collapsed into a single level.
Waterworks Technician III	Because there was no difference between the II and III levels, the class was collapsed into two levels and the positions were re-titled Waterworks Technician II
Water Quality Technician	Laboratory Technician
Laboratory Analyst I/II/III	Scientist I/II/III
Senior Laboratory Analyst	Senior Scientist
Director of New Business	Director of Development Services
Development Services Representative I/II Senior Development Services Representative	Development Services Technician I
Senior Engineering technician (one position in Development Services only)	Senior Development Services Technician

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. There are two categories of reclassification for this study.

- K&A Reclassification – These reflect recommendations made by K&A as part of the initial analysis and employee/union review process for positions which in our assessment were not in the proper classification. There were ten (10) positions reclassified by K&A.



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- District Reclassification – These reflect recommendations made by the District based upon flexible staffing progression, and/or reviews with management and the union, specifically when new changes in duties and responsibilities assigned to a position, which were not in the original analysis, occurred during the course of the study. The District consulted with K&A on all of these changes. There were forty-four (44) positions reclassified by the District; most of them were progressions based on flexibly staffed series, and others resulted from organizational changes identified below.

A total of fifty-four (54) positions were reclassified during the course of the study.

While the study was initiated in April of 2017, final allocations of positions were not implemented until the last quarter of 2018; during that period, business needs were not held in abeyance until such time as the study was completed; for example:

- The District implemented organizational changes and used the new classification structure as a basis for moving by either re-titling or reclassifying positions accordingly; these changes were generally made by Human Resources; K&A was consulted on recommended changes.
- The District has a flexibly staffed classification structure for many non-management positions (e.g., Storekeeper I/II); when a position at the Storekeeper I (entry level) has met all the standards for placement at the journey level (Storekeeper II), that action is designated as a District reclassification.
- The study review process with management, employees and the union resulted in some reclassification changes; these changes were generally made by either Human Resources or K&A and both parties were consulted on recommended changes.

Organizational changes which resulted in reclassification of positions into different classifications, and/or which resulted in title changes (next section) are presented below:

- Customer Service
 - Billing was placed in a separate unit, which continues to use the same classifications as the Customer Service Unit.
 - Customer Service Field Representative and Meter Reader positions were consolidated into a new classification of Meter Services Technician.
- Development Services (previously New Business) – organizational changes in this group resulted in title changes and some reclassifications.

The study resulted in the changes presented in Table 2. Not every incumbent in the current classification is recommended for a reclassification. The comments section notates whether the action was taken by K&A or the District.



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Table 2. Reclassification Recommendations

Current Classification Title	Proposed Classification Title/Comments
Administrative Assistant II	Operations Support Specialist – K&A
Administrative Assistant II	Executive Assistant – District
Customer Service Representative I	Customer Service Advisor – District
Customer Service Representative III	Customer Service Advisor – District
Customer Service Supervisor	Customer Service Quality Assurance Analyst – District
Customer Service Field Representative/Meter Reader	Meter Services Technician – K&A
Finance Technician II	Finance Technician III – District
Human Resources Analyst I	Human Resources Analyst II – District
Senior Business Systems Analyst	Senior Business Systems Engineer – District
Senior Database Administrator (Vacant)	Information Systems Engineer II – K&A
Senior Information Project Manager	Information Technology Project Advisor – K&A
Storekeeper I	Storekeeper II – District
Deputy Board Secretary II	Senior Executive Assistant – District
Public Affairs Officer I	Public Affairs Officer II - District
Asset Management Technician I	Asset Management Technician II - District
Water Resources Technician II	Pipeline Construction Crew Leader - District
Pipeline Construction Utility Worker I	Pipeline Construction Utility Worker II – District
Potable Water Treatment Operator I	Potable Water Treatment Operator II – District
Valve Technician I	Valve Technician II – District



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Current Classification Title	Proposed Classification Title/Comments
Water Reclamation Plant Maintenance Technician I	Water Reclamation Plant Maintenance Technician II – District
Water Reclamation Plant Operator II	Water Reclamation Plant Operator III – District
Water Reclamation Plant Operator in Training	Water Reclamation Plant Operator I – District
Environmental Compliance Analyst II	Senior Environmental Compliance Analyst – District
Water Quality Technician	Scientist I – District
Laboratory Analyst III	Scientist II – District
Laboratory Analyst III	Senior Scientist – District
Senior Laboratory Analyst	Senior Scientist – District
Source Control Inspector I	Source Control Inspector II – District
Source Control Inspector II	Senior Source Control Inspector – District
Senior Engineering Geologist	Principal Engineering Geologist – District
Construction Administration Representative I	Facilities Location Technician I – District
Project Control Technician I	Project Control Technician II – District
Construction and Safety Inspector II	Construction and Safety Inspector III – District
Control and Communication Analyst II	SCADA Technician – District

District Promotions

During the course of the study, through its promotional process, the District implemented the following internal promotions – each entry represents a single employee unless otherwise noted. Twenty-five (25) positions were promoted during the course of the study.



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Table 3. District Internal Promotions

Current Classification Title	Proposed Classification Title
Customer Service Operations Manager	Director of Customer Service
Accountant III	Financial Analyst III (C)
Financial Analyst III	Senior Financial Manager
Financial Technician II	Financial Analyst I
Buyer	Senior Buyer
Facilities Location Technician I	Safety and Claims Technician
Controls Technician II	Senior Controls Technician (2 positions)
Electrical Services Supervisor	Electrical Services Manager
Pipeline Construction Utility Worker II	Pipeline Construction Utility Worker III (2 positions)
Maintenance Trades Assistant	Industrial Engine Technician I
Mechanical Maintenance Technician	Mechanical Maintenance Supervisor
Distribution Operator III	Water Operations Supervisor
Industrial Engine Technician II	Controls Technician I
Fleet Services Mechanic I	Water Reclamation Plant Maintenance Technician I
Collection Systems Utility Worker II	Collection Systems Utility Crew Leader
Environmental Services Manager	Director of Environmental and Regulatory Compliance
Senior Laboratory Analyst	Senior Environmental Compliance Analyst
Senior Environmental Compliance Analyst	Environmental Services Manager
Senior Source Control Inspector	Source Control Manager
Source Control Inspector II	Senior Source Control Inspector
Storekeeper	Source Control Inspector I
Senior Construction and Safety Inspector	Construction Administrator



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Current Classification Title	Proposed Classification Title
Construction and Safety Inspector III	Senior Construction and Safety Inspector

New and/or Redefined Classifications

Additional actions taken during the study resulted in some new or redefined classifications; these are noted in Table 4.

Table 4. New or Redefined Classifications

New or Redefined Classification Title	Comments
Operations Support Specialist	New classification developed for Administrative Assistant positions performing specialized support within their operational departments/recorded as a reclassification.
Water Resources Specialist Assistant I/II	Mapping Technician I position allocated to this new class.
Water Resources Associate I/II	Conservation Program Specialist III position allocated to this new class.
Senior Civil Engineer	Re-defined to be a project lead; no positions were allocated to this level.
Principal Civil Engineer	Positions allocated were Senior Civil Engineer/recorded as a title change.
Principal Engineering Geologist	Position allocated from Senior Engineering Geologist/recorded as a reclassification.
Development Services Technician II	No positions allocated

No Change

Four hundred and twenty-five (425) positions did not experience any changes in title or classification as a result of the study.



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 District 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 District 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 District 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,
Koff & Associates

A handwritten signature in blue ink that reads "Georg S. Krammer".

Georg S. Krammer
Chief Executive Officer



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Appendix I

Recommended Position Allocations