



## CIVIL SERVICE BOARD MEETING AGENDA

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**Date: December 19, 2019**

**OPEN SESSION 5:30 p.m.**

**City Hall, One Frank H. Ogawa Plaza, Hearing Room 1**

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**BOARD MEMBERS:** Chair, Andrea Gourdine; Vice Chair, Christopher Johnson; Lauren Baranco; Yvonne Hudson-Harmon; Brooke Levin; Carmen Martinez; Beverly A. Williams

**STAFF TO THE BOARD:** Ian Appleyard, HRM Director/Secretary to the Board  
Greg Preece, HR Manager/Staff to the Board  
Vadim Sidelnikov, Deputy City Attorney

### OPEN SESSION AGENDA

#### ROLL CALL

#### 1) OPEN FORUM

2) **APPROVAL OF THE DECEMBER 19, 2019 CIVIL SERVICE BOARD MEETING AGENDA** ACTION

3) **UPDATES, SECRETARY TO THE BOARD** INFORMATION

4) **CONSENT CALENDAR:** ACTION

a) Approval of Provisional Appointment

- Oakland Fire Department (1)

b) Approval of Employee Requests for Leave of Absence

- Oakland Public Library

c) Approval of Revised Classification Specification

- Planner III, Historic Preservation

**5) OLD BUSINESS:**

- a) Approval of November 14, 2019 Civil Service Board Meeting Minutes ACTION
- b) Approval of the July 18, 2019 Civil Service Board Meeting Minutes ACTION
- c) Determination of Schedule of Outstanding Board Items ACTION
- d) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDE's and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 INFORMATION
- e) Update on Common Class Study – Draft Koff & Associates Report Regarding General, Administrative, Clerical, and Office Occupational Grouping INFORMATION

**6) NEW BUSINESS:**

- a) Approval of New Classification Specification for Fire Inspection Supervisor ACTION
- b) Approval of New Classification Specification for Chief of Fire, Assistant ACTION
- c) Approval of New Classification Specification for Capital Improvement Coordinator, Assistant ACTION
- d) Approval of New Classification Specification for Ethics Analyst III ACTION

**7) ADJOURNMENT**

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, January 16, 2020. All materials related to agenda items must be submitted by Thursday, January 2, 2020. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board  
150 Frank H. Ogawa Plaza, 2<sup>nd</sup> floor  
Oakland, CA 94612  
[civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)

或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



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2019 OCT 31 PM 4: 04

## AGENDA REPORT

**TO:** Sabrina B. Landreth  
City Administrator

**FROM:** Ian Appleyard  
Director, HRM

**SUBJECT:** Semi-Annual Staffing Report

**DATE:** October 23, 2019

City Administrator Approval

Date:

10/21/19

### RECOMMENDATION

**Staff Recommends That The City Council Receive The Semi-Annual Informational Report On Citywide Staffing Through September 23, 2019.**

### EXECUTIVE SUMMARY

This informational report, formally known as the "vacancy report," provides an update on city-wide staffing as of September 23, 2019, and includes the status of vacancies, recruitment and the City of Oakland full-time workforce. The total budgeted full-time positions was 4,533.21 Full-Time Equivalent (FTE) with 595.83 FTE positions vacant, resulting in a 13.14 percent vacancy rate as of September 23, 2019. This report analyzes the status of each vacancy by department (**Attachment A**), the status of the 175.90 FTE positions that were added in Fiscal Year (FY) 2019-20 (**Attachment B**), and the status of vacant positions in the Oakland Public Works Department (OPW) and the Department of Transportation (DOT) (**Attachment C**). In addition, this report identifies the number of positions filled during FY 2018-19 (**Attachment D**).

Human Resources Management (HRM) Department's recruitment priorities are set by the City Administrator, and, subsequently, in coordination with individual departments. In some instances, high-priority recruitments do not correlate to high-volume recruitments and, therefore, may not reduce the overall vacancy rate.

### BACKGROUND / LEGISLATIVE HISTORY

The Human Resources Management Department (HRM) provides a semi-annual report to both the Finance and Management Committee and Public Works Committee. This report examines vacancy data, as provided by all City Departments, as of September 23, 2019. Additionally, this report analyzes several key organizational staffing elements, including unemployment rates, retention rates and employee tenure.

Item: \_\_\_\_\_  
Finance & Management Committee  
November 12, 2019

**ANALYSIS AND POLICY ALTERNATIVES**

For the purposes of this report, vacancies are described as **non-encumbered** and **encumbered**. The former is available to be filled and not linked for any other purpose, such as overtime, temporary staffing, or acting assignments. The latter is tied to one of the aforementioned purposes.

As of September 23, 2019, there were 595.83 FTE positions vacant citywide with 60.10 FTE encumbered as described above. Therefore, the Citywide vacancy rate is 13.14 percent. If the encumbered vacancies were subtracted, there would be 535.73 FTE vacancies and the rate would be 11.82 percent. The May 2019 report had an all-vacancy rate of 14.49 percent and a non-encumbered vacancy rate of 12.50 percent. Therefore, in six months the overall vacancy rate was decreased by 1.35 percent, despite 175.90 new FTE positions being added.

It is also important to account for the “budgeted vacancy factor,” which is distinct from the “vacancy rate.” The budgeted vacancy factor is a fixed budget ratio applied to the total personnel allocation for a given department and varies between 0 percent and 4 percent.

**Status of Vacancies – City Wide**

For the Fiscal Year 2019-20, 175.90 FTE were added to the City budget. **Table 1** below shows all vacant positions (encumbered and non-encumbered), which results in the current 13.14 percent vacancy rate. Table 2 shows only non-encumbered positions, resulting in an 11.82 percent vacancy rate.

**Table 1: Citywide Vacancy Summary**

Type	All Positions	Vacant	% Vacant
Total Sworn	1,429	78	5.46%
Total Miscellaneous	3,104.21	517.83	16.68%
<b>Total</b>	<b>4,533.21</b>	<b>595.83</b>	<b>13.14%</b>

**Table 2: Citywide Vacancy Summary (Non-Encumbered)**

Type	All Positions	Vacant	% Vacant
Total Sworn	1,429	78	5.46%
Total Miscellaneous	3,104.21	457.73	14.75%
<b>Total</b>	<b>4,533.21</b>	<b>535.73</b>	<b>11.82%</b>

**Table 3** shows the historic vacancy rates, for both all vacancies and non-encumbered vacancies since May 2012. Since 2014, there have been 595.95 FTE positions added, including 175.90 added for Fiscal Year 2019-20.

Report Date	# of budgeted positions	# non-encumbered vacancies	Non-encumbered % Vacant	All Vacancies	All Vacancies % Vacant
11/12/19	4,533.21	535.73	11.82%	595.83	13.14%
5/14/19	4,455.17	556.85	12.50%	645.66	14.49%
11/13/18	4,447.67	522.25	11.74%	742.37	16.69%
4/24/18	4,282.97	419.50	9.79%	652.60	15.24%
11/14/17	4,279.22	406.70	9.50%	621.30	14.52%
10/24/16	4,186.84	377.07	9.00%	554.45	13.24%
10/5/15	4,151.78	432.72	10.42%	502.53	12.10%
9/22/14	3,937.26	341.01	8.66%	489.40	12.43%
5/20/13	3,813.39	295.88	7.75%	427.82	11.22%
5/14/12	3,796.53	259.88	6.88%	366.40	9.65%

When Departments submit vacancy information, standard descriptors are available from which to choose. **Table 4** is a summary of vacancy status throughout all departments.

FTE	Vacancy Status
93.50	Recruitment Plan in Progress
78.05	Recruitment Open (application intake)
71.75	Dept. Interview Process
60.10	Encumbered (Interim, acting, provisional, part-time, linked to TCSE/ELDE) *
67.25	Requisition Pending Approval
58.86	Not Under Active Recruitment
49.00	Eligible List Available
23.80	On Hold (Job spec revisions or FEHA Hold) **
21.50	On Hold (by Dept.)
21.02	Eligible List Referred to Dept.
20.00	Approved (pending HR assignment)
19.00	HR Assessment & Scoring
12.00	Recruitment Closed (HRM/Dept. screening apps)
<b>595.83</b>	<b>TOTAL</b>

\* Temporary Contract Service Employee/Exempt Limited Duration Employee

\*\* Fair Employment and Housing Act

**Status of Vacancies – Departments**

**Table 5** shows the total vacancy rate by department, sorted by high to low percentage. As noted above, some vacancies are encumbered and do not necessarily reflect accurate vacant rates within each department.

<b>Table 5: Vacancies by Department</b>			
<b>City of Oakland Departments</b>	<b>No. of Authorized positions (FTE)</b>	<b>No. of vacant positions (FTE)</b>	<b>Vacancy Rate</b>
Violence Prevention	3.00	2.00	66.67%
Planning & Building	205.50	58.50	28.47%
Housing & Community Dev	74.50	19.50	26.17%
Economic & Workforce Dev	49.70	10.00	20.12%
Transportation	324.04	64.25	19.83%
Public Works	636.17	125.17	19.68%
Finance	167.80	32.80	19.55%
Police Commission	17.00	3.00	17.65%
Parks, Recreation & Youth Dev.	229.69	31.73	13.81%
City Administrator	94.10	12.00	12.75%
Information Technology	81.00	10.00	12.35%
Human Resources	50.00	6.00	12.00%
Human Services	242.13	27.60	11.40%
City Attorney	82.00	9.00	10.98%
City Clerk	18.50	2.00	10.81%
Library	269.18	27.00	10.03%
City Auditor	10.00	1.00	10.00%
Police	1274.20	109.00	8.55%
Fire	651.78	45.28	6.95%
Race & Equity	3.00	0.00	0.00%
Mayor	13.00	0.00	0.00%
City Council	30.92	0.00	0.00%
Public Ethics Commission	6.00	0.00	0.00%
<b>Citywide Vacancy Rate</b>	<b>4,533.21</b>	<b>595.83</b>	<b>13.14%</b>

To understand how Oakland compares to regional jurisdictions, HRM surveyed eight agencies within the region. The survey results, provided in **Table 6**, shows the average regional vacancy rate is 12.32 percent.

Comparator Agencies	No. of Depts.	No. of Budgeted positions	No. of vacant positions	Vacancy Rate
City of Berkeley	18	1,596	237	14.85%
City of Concord	10	419	28	6.68%
Contra Costa County	22	10,928	1,872	17.13%
City of Fremont	14	953	90	9.44%
City of Hayward	13	928	94	10.13%
City of Richmond	24	723	74	10.24%
City & County of San Francisco	50	36,680	4,069	11.09%
City of San Jose	23	6,647	790	11.89%
<b>Regional Vacancy Rate Average</b>		<b>58,874</b>	<b>7,254</b>	<b>12.32%</b>
<b>City of Oakland</b>	<b>23</b>	<b>4,533.21</b>	<b>595.83</b>	<b>13.14%</b>

**Positions Filled During Fiscal Year 2018-19**

There were 708 positions (not FTE) filled during the last fiscal year. Of those, 416 were full-time or permanent part-time and 255 (61 percent) of those were filled with current employees promoting to other positions. A list of the filled positions is included as **Attachment D**.

Since the beginning of the current fiscal year, an additional 242 positions have been filled. Of the 242, 167 were full-time or permanent part-time and 112 (67 percent) of those were filled by current City employees.

While the City remains focused on growing its own to fill positions, and while internal promotions are exceptionally beneficial for the health of the organization and workforce, it should be noted they result in a net-zero gain from the vacancy perspective in that each promotion creates another vacancy elsewhere.

**Recruitment Conditions and Solutions**

1. National and Regional Market Conditions: According to the latest Bureau of Labor Statistics, the nation's unemployment rate is 3.5 percent. The California unemployment rate is 4.0 percent according to the California Employment Development Department. For the San Francisco, Oakland and Richmond region, the unemployment rate is 2.7 percent. These conditions are a significant factor when recruiting for qualified and diverse candidates and have an impact on the number of applications HRM is receiving for vacancies. Some recruitments require extensions to the application period to allow for

additional applicants. In some cases, newly-created eligible lists for a classification have been exhausted by departments before all vacant positions could be filled.

2. HR Staffing Update: Since the last Staffing Report, HRM has filled three (3) HR Analyst positions, which has allowed for an increase in the number of recruitments being conducted. While Analyst staffing has increased, HRM did lose staff members this year at the HR Clerk and Benefits Representative positions. Recruitments are underway to fill these positions as soon as possible.
3. Recruitment Consultant: With City Council's approval via Resolution No. 87291 C.M.S., a three-year contract was executed in 2018 with Cooperative Personnel Service (CPS) to provide on-call recruitment services for departments. To date, CPS has assisted with twenty (20) recruitments, primarily within the Public Works, Transportation, and Finance Departments. This remains an available resource for departments with the ability to fund the consultant. Over the next several months, the consultant will be working on recruitments for the Public Works and Transportation Departments, including more than fifteen (15) positions in the Equipment Services Shop.
4. Decreased Applicants for Public Sector Positions: The 2019 Job Seeker Report was recently released by NeoGov, the vendor HRM uses as its applicant tracking system. This report is based on an analysis of data from 783 public agencies and calls attention to the shortage of applications public agencies are receiving to fill vacancies. A few of the statistics within the report include:
  - a) A 37 percent differential between open jobs and the number of applicants.
  - b) A 22 percent reduction in applicants from 2013 to 2018.
  - c) A 29 percent increase in the number of job openings since 2013. This is partially a result of nearly 30-40 percent of the public sector workforce being eligible to retire.

The entire report is included as **Attachment E**.

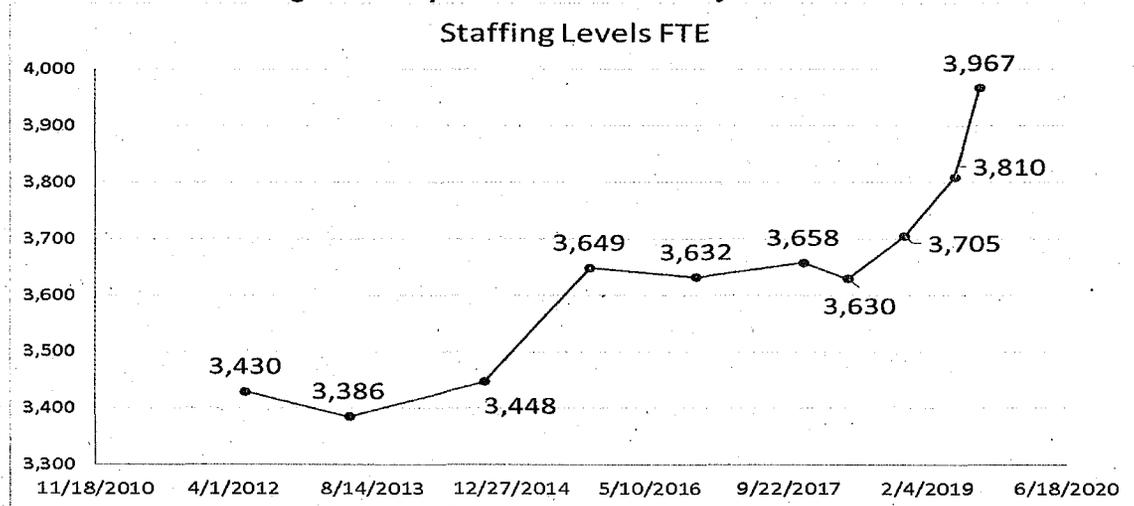
5. Improved Marketing: HRM continues to use various methods to market jobs to potential candidates. Increased outreach through social media platforms such as LinkedIn and Nextdoor have been successful in reaching potential applicants. In addition, HRM personnel continue to attend job fairs and community events to attract interest in City jobs.

## Workforce Analysis

In addition to reducing employee vacancies through effective and efficient hiring practices, it is imperative to focus on retaining and developing the existing workforce. To further understand retention, included below are staffing, separation, resignation and tenure data. The results suggest that Oakland does very well in retaining employees. The FY18-19 resignation rate for non-sworn employees is 4.57 percent (105 total) with an average tenure of 6.27 years.

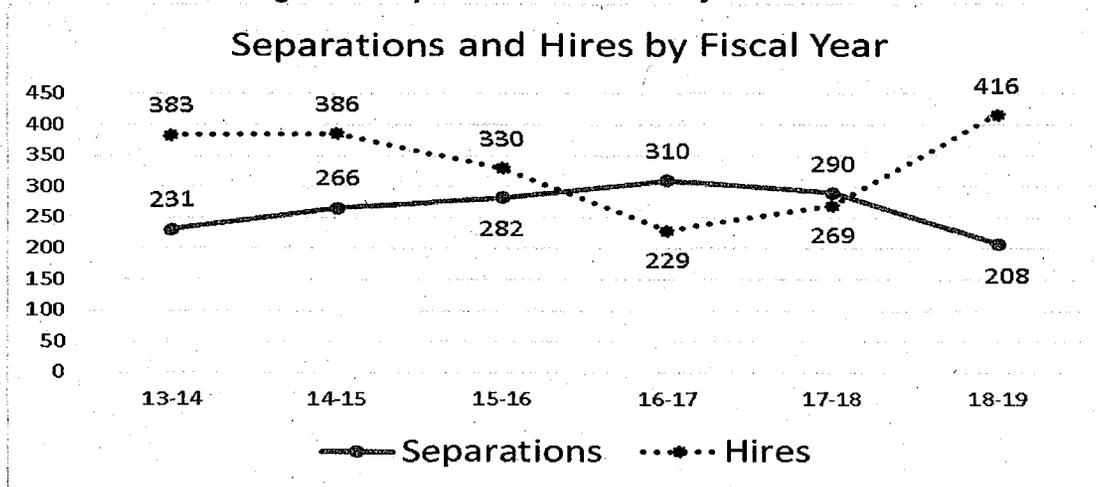
1. **Staffing Levels:** Since 2014, 595.95 FTE positions were added to the City's budget. While the vacancy rate has remained consistent with small fluctuations, the overall number of employees tied to FTE positions has increased by 519 during the same time. As shown in **Figure A** below, as of August 12, 2019, 3,967 FTEs have been filled. This number includes full-time, permanent part-time and temporary part-time staff. Multiple temporary part-time staff may be tied to one FTE position.

**Figure A: Separations and Hires by Fiscal Year**

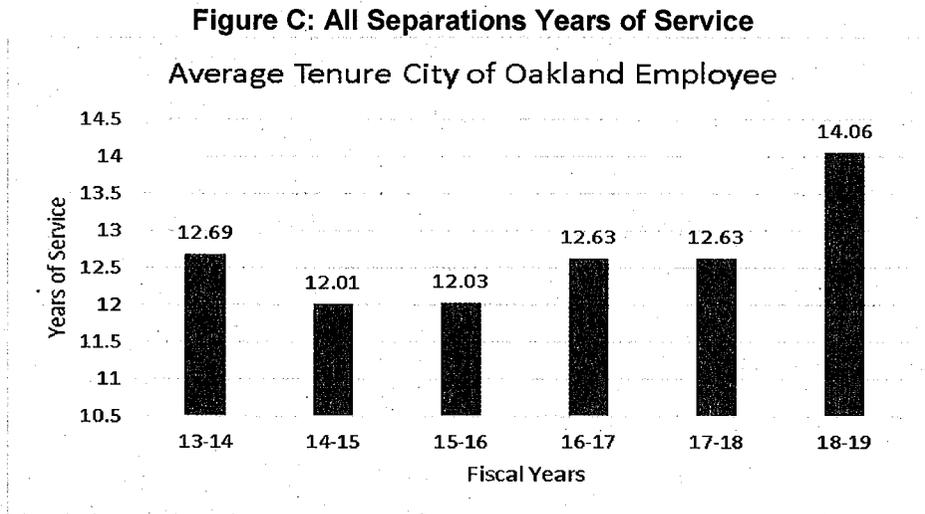


2. **Separations and Hires:** To reduce the overall vacancy rate, City hiring needs to outpace separations. As demonstrated in **Figure B**, over the last five years, the number of hires tracks closely to the number of separations, which includes retirements, resignations, terminations and other reasons. However, for FY18-19, the number of all separations significantly decreased, from 290 to 209 (28 percent decrease). At the same time, hires increased for FY 18-19 from 269 to 416 (55 percent increase).

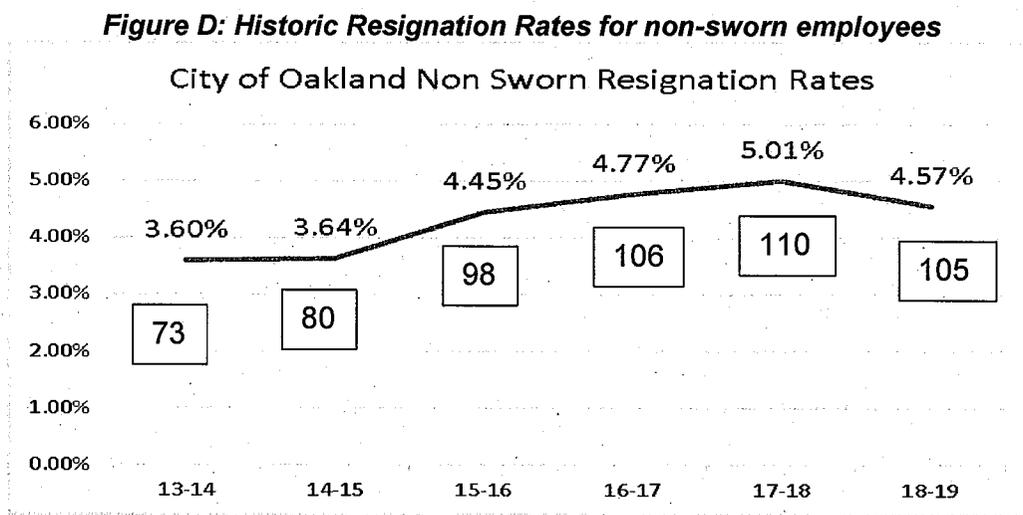
**Figure B: Separations and Hires by Fiscal Year**



3. **Tenure of Separations:** According to the Bureau of Labor statistics, the national rate of tenure with a public-sector employer is 6.8 years (private sector is 4.2 years), which includes all separations. Over the last six years, all separated full-time City of Oakland employees average 12.7 years of service with the current fiscal-year increasing to 14.06 years, far surpassing the national average. See **Figure C** below:

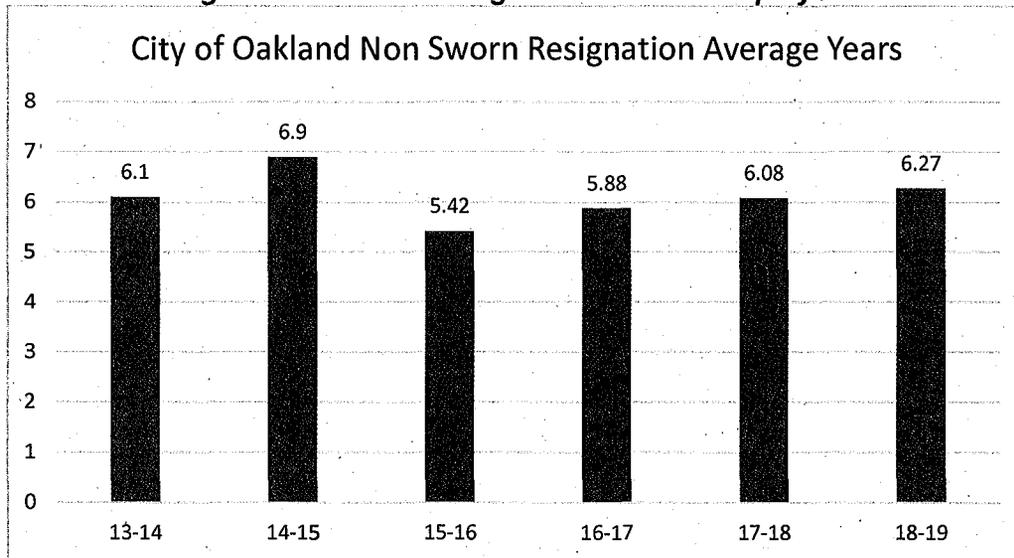


4. **Voluntary Resignation Rates:** The resignation rate is calculated by dividing the number of voluntary resignations by the total number of employees. For the purposes of this analysis, only non-sworn full-time employees were considered. A typical resignation rate for local government during normal economic times ranges between 4.5 percent to 5.5 percent. Given the historically low unemployment, it would be anticipated that the rate would be significantly higher, perhaps 6 percent to 8 percent. **Figure D** shows the rate for non-sworn full-time City of Oakland employees was 4.57 percent for Fiscal Year 18-19.



5. Voluntary Resignation Tenure: Over the last six years, the average tenure of a non-sworn City of Oakland employee who voluntarily resigns is 6.1 years. **Figure E** shows the number of years of service has steadily increased over the last three years, confirming that Oakland does well in terms of workforce retention. The average tenure of a City of Oakland non-sworn employee was 6.27 years of service for Fiscal Year 18-19.

**Figure E: Tenure of resigned non-sworn employees**



**FISCAL IMPACT**

This item is for informational purposes only and does not have a direct fiscal impact or cost. All positions reflected in this report are budgeted positions.

**PUBLIC OUTREACH / INTEREST**

No outreach was necessary for this report beyond the standard City Council agenda noticing procedures.

**COORDINATION**

Human Resources Management Department staff coordinated the collection and verification of data provided in this report with staff in each of the City's departments and the Finance Department.

**PUBLIC OUTREACH / INTEREST**

No outreach was necessary for this report beyond the standard City Council agenda noticing procedures.

**COORDINATION**

Human Resources Management Department staff coordinated the collection and verification of data provided in this report with staff in each of the City's departments, the Finance Department's Budget Bureau, and the Office of the City Attorney.

**SUSTAINABLE OPPORTUNITIES**

***Economic:*** There are no economic impacts associated with this informational report.

***Environmental:*** There are no environmental impacts associated with this informational report.

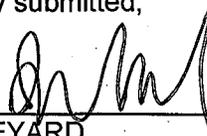
***Social Equity:*** There are no social equity impacts associated with this informational report.

**ACTION REQUESTED OF THE CITY COUNCIL**

Staff recommends acceptance of the Semi-Annual Informational Report On Citywide Staffing Through September 23, 2019.

For questions regarding this report, please contact Greg Preece, Human Resource Manager, at (510) 238-3112.

Respectfully submitted,



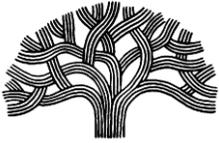
\_\_\_\_\_  
IAN APPLEYARD  
Director, Human Resources Management

Reviewed by:  
Greg Preece, Human Resources Manager

Attachments Prepared by:  
Lisa Wright, HR Operations Supervisor

Attachments (5):

- A – Citywide Vacancies by Department*
- B – New Vacancies Created in Adopted Policy Budget FY 2019-20*
- C – Vacancies in Oakland Public Works and the Department of Transportation*
- D – Positions filled FY 2018-2019*
- E – NeoGov 2019 Job Seeker Report*



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Alan Aguirre  
Human Resource Analyst

**THROUGH:** Ian Appleyard, HRM Director  
Secretary to the Board

**THROUGH:** Greg Preece  
Human Resources Manager - Recruitment, Classification and Benefits

**SUBJECT:** Request for Provisional Appointment in Classification of Fire Equipment Technician to be ratified at the Civil Service Board Meeting of December 19<sup>th</sup>, 2019

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Attached is a request from the Oakland Fire Department to make a provisional appointment to a Fire Equipment Technician vacancy. The basis for this request is detailed in the attached Provisional Appointment Form as supporting documentation.

The Fire Equipment Technician position performs a variety of warehousing and driving duties including shipping, receiving and issuing of supplies and inventory; sorts, delivers, or transports equipment, mail, and/or personnel; maintains and services equipment related to compressed air, oxygen and fire extinguishers; cares for and maintains firefighter personal protective gear through cleaning, inspection, and repair; and performs related duties as assigned.

The minimum qualifications for Fire Equipment Technician are: a high school diploma or equivalent and one (1) year of experience in inventory control and store keeping; including materials handling, repair and maintenance; delivery of supplies, and heavy manual labor.

The selected candidate meets the minimum qualifications of the Fire Equipment Technician position with a Bachelor's Degree in Information Systems and with one year and nine (9) months of experience with Oakland Fire Department as a Fire Equipment Technician and Fire Communications Dispatcher as well as with Alameda County's Department of Agriculture as a Pest Detection Specialist for three (3) years. Recruitment and Classification is in the process of administering a Civil Service Examination to permanently fill this vacancy within 120 days. The job announcement will be posted on December 16, 2019.

The Human Resources Management Department recommends that the Civil Service Board ratify the provisional appointment for this Fire Equipment Technician position in the Oakland Fire Department beginning on December 2, 2019 and ending on or before March 3, 2020.

**OAKLAND CIVIL SERVICE BOARD  
PROVISIONAL APPOINTMENT REQUEST**

**SCHEDULED MEETING DATE FOR CONSIDERATION:** December 19, 2019

**AREA REQUESTED**

POSITION: Fire Equipment Technician  
DEPARTMENT: Oakland Fire Department  
APPOINTMENT DURATION: 120 days maximum

**STATUS OF RECRUITMENT AND EXAMINATION PROCESS**

**DATE ELIGIBLE LIST EXPIRED OR WAS EXHAUSTED:** N/A  
**DATE PERSONNEL REQUISITION RECEIVED:** November 19, 2019  
**CURRENT STATUS OF EXAMINATION:** The job announcement will be posted on December 16<sup>th</sup>, 2019.

**JUSTIFICATION:**

Reason Needed:

This provisional appointment is needed to fill one (1) current vacancy. The requisition requesting the provisional appointment was approved. A provisional appointment will allow the work to be performed while an eligibility list is being developed. The Fire Equipment Technician is needed to meet NFPA and OSHA guidelines related to Oakland Fire Department's service and maintenance of Self Contained Breathing Apparatuses (SCBAs). Having this position staffed is critical to the health and safety of Oakland Fire Department's staff and maintain the SCBA program.

Other Alternatives Explored and Eliminated:

None.

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**IMPACT IF REQUESTS ARE NOT APPROVED** (i.e., services, fiscal, other):

The negative impacts of not having this vacancy filled while an eligibility list is established would severely impact the Department's ability to meet NFPA and OSHA guidelines and to provide service and maintenance to the Department's SCBAs.

Attachments:

Recruitment and Classification Staff Recommendation, including following pertinent information:

- Summary of Application Qualifications ✓
- Current Residency Status: *Non - Oakland Resident*
- Current Employment Status: *Current City of Oakland employee, ELDE assignment as a Fire Equipment Technician*



# MEMORANDUM

**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Greg Preece, Human Resources Manager / Staff to the Board 

**THROUGH:** Ian Appleyard, Human Resources Director / Secretary to the Board

**SUBJECT:** Request Authorization for Employee Requests for Leave of Absence

HRM is in receipt of one (1) Unpaid Leave of Absence requests pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

Employee Name	Classification	Department	Leave Duration	Category
Ortiz, Ana	Library Aide, PPT	Oakland Public Library	January 10, 2020 – January 23, 2020	CRS 8.07 (c)(iii) Personal Business

**RECOMMENDATION:**

Staff recommends that the Civil Service Board approve the requested Leave of Absence.



# Unpaid Leave of Absence

Leave Type:

- FCL - Family Care Extended
- FDN - Family Death (no pay)
- MNP - Military Leave (no pay)
- SLV - Sick Leave (no pay)
- ANP - Miscellaneous (no pay)
- Parental Leave (no pay)

Employee's Name Ana Ortiz

Employee's ID 23961

Today's Date 10/15/19

Department/Division Library

Employee Job Title Library Aide

Request: 14  
No. of Days or Hours

Days  Hours  
Select Days or Hours

From 01/10/20

To 01/23/20

Unpaid Leave Taken This Year?

Yes  No

If yes, what type of leave ANP

(Write appropriate code)

Comparison of Different Leave Types					
Leave Type	Maximum Duration	Keep Accrued Seniority?	Seniority?	Keep Health Benefits?	Other
FCL	4 mos*	Yes	No	Depends*	Comb. of paid & unpaid leave
FDN	5 days	Yes	No	Yes	Family death leave (paid) exhausted
MNP	1 year	Yes	Yes	For 5 mos*	For military training and service
SLV	1 year	Yes	No	No*	Sick leave (paid) exhausted
ANP	1 year	Yes	No	No*	Miscellaneous leave (no pay)
PNP	1 year	No	No	No*	Parental Leave (no pay)

\* Additional Information

Employees on ANP, MNP, SLV or PNP may continue to participate in a City group health plan under COBRA at their own cost.

Family Care Extended Leave allows employees to use a combination of paid and unpaid leave. Employees using paid leave keep their health benefits, while employees on unpaid leave for this category are entitled to extend their coverage under COBRA at their own cost. If the leave is unpaid parental, an employee may take up to a maximum of 5 months leave.

Employee's Signature

10/15/19

Date

Civil Service Board Approval

Date

Department Head Approval

10/28/19

Date

City Manager Approval

Date

Note: Civil Service Board approval is required for leave of 5 days or more for classified employees. City Manager approval is required for leave of 5 days or more for exempt employees.



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board      **FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of Revised Classification Specification for Planner III – Historic Preservation

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Based upon a classification review at the request of the Planning & Building Department (PBD), staff has proposed revisions to the **Planner III, Historic Preservation** classification specification. While the classification has existed for many years, only a working draft was on file until a few years ago. The official classification specification was approved in March 2016 and has not been revised since that time.

Minimal edits are necessary. The Minimum Qualifications will be altered under this proposal. The required years of experience will change from three (3) to four (4) to ensure alignment with the Minimum Qualifications of other Planner III level classifications.

There are two budgeted positions, which includes one filled and one vacant. The approved classification specification will be used to initiate future recruitment and selection processes.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City staff and union representatives discussed the potential impacts at a meeting on December 3, 2019. In an email dated December 5, 2019, the union confirmed that there are no objections to the proposed revisions.

Additionally, the “common class” status of this classification has not been determined. The "Common Class" Project is currently underway, and more information regarding this classification will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed revisions to the **Planner III, Historic Preservation** classification specification.

**Attachments:** Revised draft Planner III, Historic Preservation classification specification.



## PLANNER III, HISTORIC PRESERVATION

**Class Code: AP380 FTE  
AP276 PPT**

**Civil Service Classified**

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### DEFINITION

Under direction in the Planning and Building Department, serves as staff to the Landmarks Preservation Advisory Board; conducts technical analyses of historic buildings for proposed demolition or alteration; prepares mandated documents for landmark designation; administers preservation incentives and regulations under the Historic Preservation Element of the Oakland General Plan; conducts and/or advises on design, development, and environmental review; prepares federal and state grant applications for historical and architectural surveys; conducts field surveys and historical research; makes presentations to various groups; may supervise assigned staff; and performs related duties as assigned.

### DISTINGUISHING CHARACTERISTICS

This is an advanced journey level classification. Incumbents perform major projects with little supervision. This classification differs from the higher level Planner IV in that Planner III – Historical Preservation performs less complex or difficult tasks and may supervise assigned staff or a small work unit.

Incumbents receive direction from a Planner IV, Planner V or a division manager and may provide lead direction to supervision of interns, volunteer staff, consultants, and assigned professional, technical or clerical staff.

### EXAMPLES OF DUTIES - *Duties may include, but are not limited to, the following:*

Serve as staff to the Landmarks Preservation Advisory Board; prepare the agenda and attachments; present issues and, as appropriate, advise the Board; record decisions taken by the Board.

Conduct design reviews of proposed work on historic buildings; act as case planner for major development projects involving historic resources; prepare reports.

Undertake a technical analysis of any proposed demolition of historic structures; investigate the merit and validity of applicant's reasons for demolition; develop strategies to preserve the structure.

Conduct technical analysis of proposed alterations to historic structures for compliance with zoning regulations and standard historic criteria; work with the applicant and the applicant's architect to arrive at an acceptable design solution.

Prepare mandated documents for landmark designation; advise property owners regarding landmark designation and the designation process; assemble and condense public comment on proposed nominations.

Conduct field and intensive surveys in selected areas of the City; make visual inspections of surveyed properties; photograph and document properties in survey areas.

Prepare regulations and policies related to historic preservation.

Analyze public records for historical information; research and evaluate information gathered for each surveyed property; prepare and maintain inventory documentation.

Administer the annual Mills Act program; assist applicants with Mills Act and other preservation incentives including State Historical building code, façade improvement program, and investment tax credits.

Develop or assist with developing preservation policy such as Preservation Element implementation or revision, drafting ordinances and zoning text, and researching and enacting incentive and mitigation programs.

Carry out City responsibilities under Certified Local Government program.

Provide liaison and information on historic resource matters to City departments and the public including support for planning efforts and environmental review under application guidelines and regulations.

Provide information and assistance to property owners and the general public regarding landmark designation and application, property histories, incentives and regulations, and rehabilitation and design principles.

Make presentations to department staff, the City Council, neighborhood groups, and professional organizations.

Research and write reports and correspondence.

May provide lead direction to or schedule, assign, supervise, and evaluate assigned staff.

Prepare service contracts; select consultants and interns; approve payment requests.

Drive a vehicle to site inspections and make presentations to community groups during office hours or in the evening.

## **KNOWLEDGE AND ABILITIES**

### **Knowledge of:**

- Theories, concepts, and principles of architecture and design review.
- Historical and architectural documentation, architectural preservation.
- Building construction methods and materials.
- Federal, state, and local laws, regulations, and codes governing the preservation of historical properties and environmental review.
- Computer systems and applications.
- Public contact and community relations
- Principles of supervision and development.

### **Ability to:**

- Plan, organize, and evaluate urban design or historical preservation projects.
- Find creative solutions for the preservation of historical structures.
- Interpret federal, state, and local regulations pertaining to city historical landmarks,

preservation, and environmental review.

- Write grant applications.
- Negotiate and administer service contracts; provide direction to consultants and interns.
- Coordinate functions and activities between the department and other agencies.
- Establish cooperative relationships with property owners, architects, and the public.
- Communicate effectively in both oral and written form.
- Prepare reports, proposals, and written materials of an analytical, financial, technical or evaluative nature.
- Supervise, train, and evaluate assigned staff.
- Use personal computer and software applications.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

### MINIMUM QUALIFICATIONS

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

#### **Education:**

A Bachelor's degree from an accredited college or university in planning, architecture, architectural history, urban design or a related field. A Master's degree from an accredited college or university in city planning, urban design or preservation may be substituted for one year of work experience.

#### **Experience:**

Four (4) ~~Three~~ years of progressively responsible experience in urban design, architectural preservation, preservation planning, historical research, or a related field.

### LICENSE OR CERTIFICATE

Successful incumbents in this position are expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

### OTHER REQUIREMENTS

Certain positions may require qualification under 36 Code of Federal Regulation Part 61.

**DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established: 03/17/2016 CSB Resolution #: 44805 Salary Ordinance #:  
Exempted: Y  N  Exemption Resolution #:

Revision Date: / / CSB Resolution #:  
Re-titled Date: / / CSB Resolution #: Salary Ordinance #:

(Previous title(s): )



Date: November 14, 2019

OPEN SESSION 5:30 p.m.

City Hall, One Frank H. Ogawa Plaza, Hearing Room 1

**BOARD MEMBERS:** Chair, Andrea Gourdine; Vice Chair, Christopher Johnson; Lauren Baranco (arrived at 5:45 PM); Yvonne Hudson-Harmon; Brooke Levin; Carmen Martinez (absent); Beverly A. Williams

**STAFF TO THE BOARD:** Ian Appleyard, HRM Director/Secretary to the Board  
Greg Preece, HRM Manager/Staff to the Board  
Vadim Sidelnikov, Deputy City Attorney

## \*SPECIAL MEETING\*

### OPEN SESSION AGENDA

#### ROLL CALL

#### 1) OPEN FORUM

#### 2) APPROVAL OF THE NOVEMBER 14, 2019 CIVIL SERVICE BOARD MEETING AGENDA ACTION

**44953** A motion was made by Vice Chair Johnson and seconded by Board Member Williams to approve the November 14, 2019 Civil Service Board Meeting Agenda with a modification to item 6a, which will be removed and heard at the December meeting. The motion passed unanimously.

**Votes:** Board Member Ayes: 5 – Gourdine, Johnson, Hudson-Harmon, Williams, Levin

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Martinez

#### 3) UPDATES, SECRETARY TO THE BOARD INFORMATION

Director Appleyard provided information on the staffing report, which the Board requested to be presented at a future meeting. Director Appleyard

also introduced Vadim Sidelnikov who is the new Attorney to the Board. Mr. Sidelnikov gave a brief review of his background.

**4) CONSENT CALENDAR:**

**ACTION**

- a) Approval of Provisional Appointment
  - Department of Transportation
- b) Approval of Employee Requests for Leave of Absence
  - Housing & Community Development (2)
  - Oakland Police Department (2)
  - Human Resources Management
  - Transportation
- c) Approval of Revised Classification Specification
  - Fire Inspector (Civilian) – [formerly titled Fire Prevention Bureau Inspector (Civilian)]
  - Information Systems Manager II
  - Reprographic Offset Operator (formerly titled Reproduction Offset Operator)
  - Reprographic Assistant (formerly titled Reproduction Assistant)

**44954 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Williams to approve the Consent Calendar: Employee Requests for Leave of Absence and Approval of Revised Classification Specifications. The motion passed unanimously.**

**Votes:** Board Member Ayes: 6 – Gourdine, Johnson, Hudson-Harmon, Williams, Baranco, Levin.

Board Member Noes: None  
Board Member Abstentions: None  
Board Members Absent: Martinez

**5) OLD BUSINESS:**

- a) Approval of August 15, 2019 Civil Service Board Meeting Minutes

**ACTION**

**44955 Chair Gourdine requested the role to be called to approve the August 15, 2019 Civil Service Board Meeting Minutes. The motion passed unanimously.**

**Votes:** Board Member Ayes: 4 – Gourdine, Johnson, Williams, Levin.

Board Member Noes: None

Board Member Abstentions: Hudson-Harmon, Baranco

Board Members Absent: Martinez

b) Approval of the July 18, 2019 Civil Service Board Meeting Minutes ACTION

**Due to lack of quorum of members present at the July 2019 meeting, approval of the July 18, 2019 Civil Service Board Meeting Minutes will carry over to the December meeting.**

**Votes:** Board Member Ayes:

Board Member Noes:

Board Member Abstentions:

Board Members Absent: Martinez

c) Approval of the September 19, 2019 Civil Service Board Meeting Minutes ACTION

**44956 Chair Gourdine requested the role to be called to approve the September 19, 2019 Civil Service Board Meeting Minutes. The motion passed unanimously.**

**Votes:** Board Member Ayes: 4 – Gourdine, Baranco, Williams, Levin.

Board Member Noes: None

Board Member Abstentions: Hudson-Harmon, Johnson

Board Members Absent: Martinez

d) Determination of Schedule of Outstanding Board Items INFORMATION

*Report received and filed.*

e) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDE's and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21 INFORMATION

*Report received and filed.*

- f) Update on Common Class Study

INFORMATION

*Report received and filed.*

**6) NEW BUSINESS:**

- a) Approval of New Classification Specification for Fire Inspector Supervisor

ACTION

*This item was pulled from the agenda and will be heard at the December 19, 2019 meeting.*

*No Action Required*

- b) Approval of New Classification Specification for Sign Shop Coordinator

ACTION

**44957 A motion was made by Board Member Levin and seconded by Board Member Williams to approve the new Classification Specification for Sign Shop Coordinator. The motion passed unanimously.**

**Votes:** Board Member Ayes: 6 – Gourdine, Johnson, Hudson-Harmon, Williams, Baranco, Levin.

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Martinez

- c) Quarterly Report per Section 3.04 of the Personnel Manual of the Civil Service Board (“Civil Service Rules”) Providing Status of all Classification Specifications Revisions Currently Under Review

INFORMATION

**CLOSED SESSION AGENDA**

**ROLL CALL**

*The Civil Service Board will Convene in Closed Session and will Report Out any Final Decisions in Open Session Before Adjourning the Meeting pursuant to California Government Code Section 54957.6:*

**1) Personnel Matter for Public Employee: 4.06 - Appeal Regarding Basis of Rejection of Employment Applications: HRM-2019-AP01 (A. Duncan)**

Pursuant to California Government Code Section 54957 – Public Employee Discipline/Dismissal/Release *An appellant must notify the Civil Service Board in writing if she/he wishes to have a personnel matter heard in open session.*

**2) 4.05 - Appeal Regarding Eligibility to Compete in Competitive Examination Process; 4.06 – Basis for Rejection of Applications; 4.22(e) – Removal of Names from Eligible Lists: HRM-2019-AP02 (T. Glasper)**

Pursuant to California Government Code Section 54957 – Public Employee Discipline/Dismissal/Release *An appellant must notify the Civil Service Board in writing if she/he wishes to have a personnel matter heard in open session.*

**OPEN SESSION AGENDA**

**3) REPORT OF ACTIONS TAKEN IN CLOSED SESSION**

With regard to the Personnel Matter for Public Employee: 4.06 - Appeal Regarding Basis of Rejection of Employment Applications: HRM-2019-AP01 (A. Duncan), Deputy City Vadim Sidelnikov reported that the Civil Service Board, by unanimous vote, voted to deny the Appeal Regarding Basis of Rejection of Employment Applications (HRM-2019-AP01) and uphold the decision of the Human Resources Department regarding your application for Captain of Fire.

With regard to the Personnel Matter for Public Employee: 4.05 - Appeal Regarding Eligibility to Compete in Competitive Examination Process; 4.06 – Basis for Rejection of Applications; 4.22(e) – Removal of Names from Eligible Lists: HRM-2019-AP02 (T. Glasper) Deputy City Vadim Sidelnikov reported that the Civil Service Board, by unanimous vote, voted to deny the Appeal (HRM-2019-AP02) and uphold the decision of the Human Resources Director regarding the Fire Communications Supervisor Recruitment (19-SC148-01).

**7) ADJOURNMENT**

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, December 19, 2019. All materials related to agenda items must be submitted by Thursday, December 5, 2019. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

City of Oakland - Civil Service Board  
150 Frank H. Ogawa Plaza, 2<sup>nd</sup> floor  
Oakland, CA 94612  
[civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) or call (510) 238-3112 or (510) 238-3254 for TDD/TTY five days in advance.

¿Necesita un intérprete en español, cantonés o mandarín, u otra ayuda para participar? Por favor envíe un correo electrónico [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov) o llame al (510) 238-3112 o al (510) 238-3254 Para TDD/TTY por lo menos cinco días antes de la reunión. Gracias.

你需要手語, 西班牙語, 粵語或國語翻譯服務嗎? 請在會議前五個工作天電郵 [civilservice@oaklandca.gov](mailto:civilservice@oaklandca.gov)

或致電 (510) 238-3112 或 (510) 238-3254 TDD/TTY



## CIVIL SERVICE BOARD MEETING MINUTES - DRAFT

**Date: July 18, 2019**

**OPEN SESSION 5:30 p.m.**

**City Hall, One Frank H. Ogawa Plaza, Hearing Room 1**

**BOARD MEMBERS:** Chair, Andrea Gourdine; Vice Chair, Christopher Johnson (arrived 5:38); Lauren Baranco (Absent); Yvonne Hudson-Harmon (Absent); Brooke Levin; Carmen Martinez; Beverly A. Williams (Absent)

**STAFF TO THE BOARD:** Ian Appleyard, HRM Director/Secretary to the Board (Absent)  
Greg Preece, HRM Manager/Staff to the Board  
Tabitha Pulliam, HRM Technician/Staff to the Board  
Michelle Meyers, Senior Deputy City Attorney

### OPEN SESSION AGENDA

#### ROLL CALL

**1) OPEN FORUM:**

No speakers

**2) UPDATES, SECRETARY TO THE BOARD:**

General Recruitment and Classification Updates presented by Greg Preece, HRM Manager.

**3) APPROVAL OF THE JULY 18 2019 CIVIL SERVICE BOARD MEETING AGENDA:**

**44940 A motion was made by Vice Chair Johnson and seconded by Board Member Martinez to approve the July 18, 2019 Civil Service Board Meeting Agenda. The motion passed unanimously.**

**Votes:** Board Member Ayes: 4 – Gourdine, Johnson, Levin, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Hudson-Harmon, Williams

**4) CONSENT CALENDAR:**

a) Approval of Employee Requests for Leave of Absence

- Library
- Oakland Police Department

**44941 A motion was made by Vice Chair Johnson and seconded by Board Member Martinez to approve the Consent Calendar: Employee Requests for Leave of Absence. The motion passed unanimously.**

**Votes:** Board Member Ayes: 4 – Gourdine, Johnson, Levin, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Hudson-Harmon, Williams

**5) OLD BUSINESS:**

a) Approval of June 20, 2019 Civil Service Board Meeting Minutes

**44942 A motion was made by Chair Gourdine and seconded by Vice Chair Johnson to approve the June 20, 2019 Civil Service Board Meeting Minutes. With two ayes and two abstentions, the motion did not pass and will carry over to the August meeting.**

**Votes:** Board Member Ayes: 2 – Gourdine, Johnson

Board Member Noes: None

Board Member Abstentions: Levin, Martinez

Board Members Absent: Baranco, Hudson-Harmon, Williams

b) Determination of Schedule of Outstanding Board Items

*Report received and filed*

c) Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of all ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

*Report received and filed*

## d) Update on Common Classification Study

*Oral report, presented by Greg Preece, received*

**6) NEW BUSINESS:**

## a) Approval of New Classification Specification for Buyer, Senior

**44943 A motion was made by Board Member Levin and seconded by Vice Chair Johnson to approve the New Classification Specification for Buyer, Senior. The motion passed unanimously.**

**Votes:** Board Member Ayes: 4 – Gourdine, Johnson, Levin, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Hudson-Harmon, Williams

## b) Quarterly Report per Section 3.04 of the Personnel Manual of the Civil Service Board (“Civil Service Rules”) Providing Status of all Classification Specifications Revisions Currently Under Review

*Report received and filed*

**(7 ADJOURNMENT 6:20 p.m.**

NOTE: The Civil Service Board meets on the 3rd Thursday of each month. The next meeting is scheduled to be held on Thursday, August 15, 2019. All materials related to agenda items must be submitted by Thursday, August 1, 2019. For any materials over 100 pages, please also submit an electronic copy of all materials.

Submit items via email or U.S. Mail to:

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**CIVIL SERVICE BOARD  
 APPEALS & HEARINGS CALENDAR  
 PENDING LIST – DECEMBER 19, 2019**

**1. OPEN**

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps
CAO-2019-AP03	Senior Contract & Compliance Officer	Contract & Compliance	3.04(e) Appeal Regarding Changes in Classification	December 19, 2019	Canceled
OFD-2019-AP02	Firefighter/ Paramedic	Oakland Fire Department	6.06 – Appeal of Probationary Release	December 19, 2019*	*Parties have requested an extension.
OPL-2019-001	Library Aide, PPT	Oakland Public Library	6.06 – Appeal of Probationary Release	January 16, 2020	

**2. OTHER PENDING ITEMS**

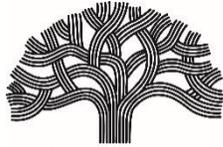
Date Requested	Subject	Report From	Date Due

**3. CLOSED**

Case Number	Classification	Dept.	Action Pending	Date Received	Notes

**4. UNDER REVIEW**

Case Number	Classification	Dept.	Action Pending	Action Date	Notes



CITY OF OAKLAND

# ***STAFF REPORT***

**DATE:** December 19, 2019

**TO:** THE HONORABLE CIVIL SERVICE BOARD

**FROM:** Greg Preece, Human Resources Manager & Staff to the Board

**THROUGH:** Ian Appleyard, Human Resources Director & Secretary to the Board

**SUBJECT:** TEMPORARY EMPLOYEES – Informational Report on the Status of Temporary Assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs) Including a Report of the Names, Hire Dates, and Departments of All ELDEs and TCSEs in Accordance with the Memorandum of Understanding Between the City and Local 21

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## **SUMMARY**

Staff has prepared this report to provide the Civil Service Board with an update on compliance with the Civil Service Rules related to temporary employees since the last report at the November 14, 2019 meeting that referenced data as of October 18, 2019. This report focuses on temporary employees in the categories of Exempt Limited Duration Employees (ELDEs) and Temporary Contract Service Employees (TCSEs), who are currently employed in the City of Oakland.

As of November 15, 2019, there are a total of eighty-six (86) employees in the TCSE (27), TCSE/Annuitant (33), and ELDE (26) categories. Seven (7) assignments were closed, and one (1) new assignment was added. Of the total, there are zero (0) assignments reported as non-compliant with Rule 5.06.

Reports showing all the temporary assignments discussed in this report are included in a list (*Attachment A*) and a chart of trends (*Attachment B*) attached to this narrative report to provide a snapshot of the overall changes month to month.

## **BACKGROUND**

The use of temporary employees is allowed under Civil Service Rule 5 (Certification and Appointment) in recognition that standard Civil Service employment practices can be cumbersome when a time-sensitive assignment arises or existing resources do not fit a specific need. Pursuant to the Civil Service Rules, Section 5.06 governing temporary assignments, ELDE assignments may not exceed one year and TCSE assignments may not be “ongoing or repetitive.”

**STATUS OF NONCOMPLIANT ASSIGNMENTS**

Of the eighty-six (86) temporary assignments, we are reporting zero (0) in this period as out of compliance with Rule 5.06.

**RECOMMENDATION**

Staff recommends that the Civil Service Board accept the monthly report on temporary assignments for Temporary Contract Service Employees (TCSEs) and Exempt Limited Duration Employees (ELDEs).

For questions regarding this report, please contact Human Resources Manager Greg Preece at (510) 238-7334.

Attachments:

- A. TCSE/ELDE Report: For Payroll Reporting November 15, 2019.
- B. TCSE/ELDE Compliance Trend Chart: As of November 15, 2019.

**CIVIL SERVICE BOARD  
DECEMBER 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
<b>CLOSED THIS PERIOD (7)</b>								
CITY COUNCIL	Lopes	Joyce	00011 - Council Administration Unit	10/4/2016	TCSE/ Annuitant	0	Filling in for Council staff out on leave	COMPLIANT
FIRE	Morris	Christopher	20611 - Education & Training Administration	12/1/2018	ELDE		Spec under development/revision for Fire Equipment Technician; duties not yet fully defined	COMPLIANT
HUMAN RESOURCES MGMT.	Banks	James	05311 - Employee Labor Relations	4/6/2019	TCSE	573	Temporary assignment to support the City-Wide training program.	COMPLIANT
POLICE	Denson III	Benjamin	106610 - Background & Recruiting	12/1/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	DeSalvo	Barbara	108630 - Cease Fire	12/31/2018	ELDE		Grant funded temp assistance to develop strategic and sustainable project implementation plans; adopt best practices and policies	COMPLIANT
POLICE	Mackson	Trevor	106610 - Background & Recruiting	12/1/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Williams	Pamela	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
<b>NEW THIS PERIOD (1)</b>								
ECONOMIC & WORKFORCE DEVELOPMENT	Lane	Patrick	85221 - Project Implementation: Staffing	11/2/2019	TCSE/ Annuitant	0	Assist with EWD Project Implementation	
<b>COMPLIANT (85)</b>								
CITY ADMINISTRATOR	Han	Delphina	02491 - Oakland Animal Services	3/9/2019	TCSE	675	Temporary assistance to support the volunteer program in Oakland Animal services	COMPLIANT
CITY ADMINISTRATOR	Kennedy	Christopher	02112 - Communications and Media	3/25/2019	ELDE		Temporary assistance in the development and improvement of the City Website.	COMPLIANT
CITY ADMINISTRATOR	King-Bailey	Colin	65111 - Public Ethics Commission	6/17/2019	TCSE	0	Temporary project to assist with creating digital campaign finance, ethics, and lobbyist data tools for Public Ethics Commission	COMPLIANT
CITY ADMINISTRATOR	Gibson	Mercedes	02112 - Communications & Media	5/4/2019	TCSE	5.5	Temporary project to assist in the development of the City's website and community outreach, etc.	COMPLIANT
CITY ADMINISTRATOR	Mufarreh	Chris	02491- Oakland Animal Services	4/23/2018	TCSE/ Annuitant	180	Temporary on-call Manager	COMPLIANT
CITY ADMINISTRATOR	Ruelas	Brenda	2113 - Communications & Media	4/20/2019	TCSE	579.25	Temporary project to assist in the development of the City's website and community outreach, etc.	COMPLIANT
CITY ADMINISTRATOR	Silverman	Eva	02112 - Communications and Media	3/18/2019	TCSE	178	Temporary assistance in the development and improvement of the City Website, external communications and community outreach	COMPLIANT
CITY ADMINISTRATOR	Woodall-Johnson	Marissa	02491 - Oakland Animal Services	4/6/2019	TCSE	169.5	Temporary relief veterinarian support at the Oakland animal shelter	COMPLIANT
CITY ADMINISTRATOR	Umopathy	Kiran	02112 - Communications & Media	6/26/2019	TCSE	8.5	Temporary project to assist in the development of the City's website and community outreach, etc.	COMPLIANT
CITY ATTORNEY	Ericsson	Kristin	04111 - City Attorney Administration	1/14/2019	TCSE/ Annuitant	135	Temporary Support for Legal Administrative Assistant out on leave	COMPLIANT
CITY AUDITOR	Edmonds	Michael	07111 - City Auditor Unit	1/12/2019	TCSE/ Annuitant	358.5	Assistant City Auditor; temporary assistance in peer review preparation and training staff	COMPLIANT
DEPT. OF TRANSPORTATION	Aghamir	Shahram	35219 - Dept of Transportation	10/5/2019	TCSE/ Annuitant	96.5	Temporary project to manage the Highway Bridge Program Projects, Railroad Safety Improvement Project, and Stairs and Paths Program.	COMPLIANT
DEPT. OF TRANSPORTATION	Calabrese	Christine	35232 - Street Lighting Engineer	2/9/2019	TCSE/ Annuitant	305	Temporary assistance to complete AC Transit Bus Rapid Transit project.	COMPLIANT

**CIVIL SERVICE BOARD  
DECEMBER 2019 MONTHLY REPORT OF TCSE/ELDE ASSIGNMENTS**

DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
DEPT. OF TRANSPORTATION	Corona Jr.	Manuel	35214 - Complete Clean Streets	1/26/2019	ELDE		Spec under development for Transportation Planner series; duties not yet fully defined.	COMPLIANT
DEPT. OF TRANSPORTATION	Kattchee	Susan	35241 - Safe Streets Administration	12/15/2018	TCSE/ Annuitant	426.25	Temporary assignment to support and train section leaders, assist with budget planning and implementation for 2019-2021	COMPLIANT
DEPT. OF TRANSPORTATION	Neary	Michael	35211 - Department of Transportation	5/21/2018	TCSE/ Annuitant	187	Temporary assistance to develop, manage and implement the GoPort Program (transportation improvement)	COMPLIANT
ECONOMIC & WORKFORCE DEVELOPMENT	Duhon-Kelley	Coco	85511- Cultural Arts & Marketing	7/13/2019	TCSE	470.5	Temporary assistance to help establish more efficient systems in the grant contracting process.	COMPLIANT
ECONOMIC & WORKFORCE DEVELOPMENT	Kidder	Sarah	85511 - Cultural Arts & Marketing	6/17/2017	TCSE	35	Temporary project support in the Film Office.	COMPLIANT
FINANCE	Agaba	Rogers	08411 - Revenue Administration Unit	8/10/2019	TCSE	435	Temporary support to assist with multiple complex departmental projects	COMPLIANT
FINANCE	Austin	Shawnita	08441 - Revenue Collections Unit	4/20/2019	TCSE	597.75	Temporary assistance to maintain operations in the Liens unit during contract negotiations	COMPLIANT
FINANCE	Bhatnagar	Amit	08211 - Accounting Administration Unit	1/8/2018	TCSE	410	Temporary project to develop Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Applications.	COMPLIANT
FINANCE	Duperval	Shela	08421 - Revenue Audit Unit	2/13/2019	TCSE	616	Temporary receptionist assistance during high volume tax renewal season	COMPLIANT
FINANCE	Gomez	Jimena	08741- Treasury Payroll	3/11/2019	ELDE		Temporary assistance with special projects and essential functions in the Payroll unit	COMPLIANT
FINANCE	Gonzales	Christopher	08921 - Parking Citation Assistance Center	9/7/2019	ELDE		Temporary assignment to assist with Receptionist duties in the Parking Citations Assistance Center. <del>Receptionist is under way</del>	COMPLIANT
FINANCE	Roberts Jackson	Tanisha	08921 - Parking Citation Assistance Center	7/13/2019	TCSE	585	Urgent temporary assistance processing backlog in the parking citation assistance center	COMPLIANT
FINANCE	Shahzada	Irfan	08411 - Revenue Administration	9/19/2019	ELDE		Temporary critical assistance to maintain operations in the Accounting dept.	COMPLIANT
FINANCE	Smith	Starr	103242 - Parking Citation Assistance Center	1/18/2019	ELDE		Urgent temporary assignment on special projects in support of Public Service Reps	COMPLIANT
FINANCE	Stoker	Barbara	08431 - Business Tax Unit	8/10/2019	TCSE	433	Temporary project to assist with new and on going back loaded division work load	COMPLIANT
FINANCE	Teshome	Theodeross	08441 - Revenue Collections Unit	5/20/2019	ELDE		Temporary assistance to help create a database of leases in preparation for GASB	COMPLIANT
FINANCE	Treglown	Donna	08111 - Finance/Controller	6/18/2018	TCSE/ Annuitant	329.5	Temporary assistance to complete Capital projects and end of year fiscal reconciliations.	COMPLIANT
FINANCE	Woodard	Phyllis	08741 - Treasury/Payroll Unit	9/6/2019	TCSE/ Annuitant	175.5	Temporary project to help train new Senior HR Operations Technicians and assist with advanced level projects	COMPLIANT
FIRE	Hellige	Scott	20813 - Fire Boat	8/12/2019	TCSE/ Annuitant	122	Temporary project to train current staff and possible expand the limited use of the Sea Wolf fire vessel to respond to emergencies.	COMPLIANT
FIRE	Hunt	Michael	20110 - Fire Chief Unit	3/23/2019	ELDE		Temporary assignment to support the department on numerous special projects, including coordination of projects between	COMPLIANT
FIRE	Kozak	Rebecca	20110 - Fire Chief Unit	5/21/2018	TCSE/ Annuitant	147	Temporary assistance developing staff and functions of the Office of the Chief of Fire manual and train Executive Assistant	COMPLIANT
HOUSING & COMMUNITY DEV.	Brady	Ellen	89969 - Residential Rent Arbitration	6/15/2019	ELDE		Critical assistance with the City's Rent Arbitration program.	COMPLIANT
HOUSING & COMMUNITY DEV.	Campos	Claudette	89969 - Residential Rent Arbitration	12/15/2018	ELDE		Critical temporary support for the Rent Adjustment Program Manager	COMPLIANT

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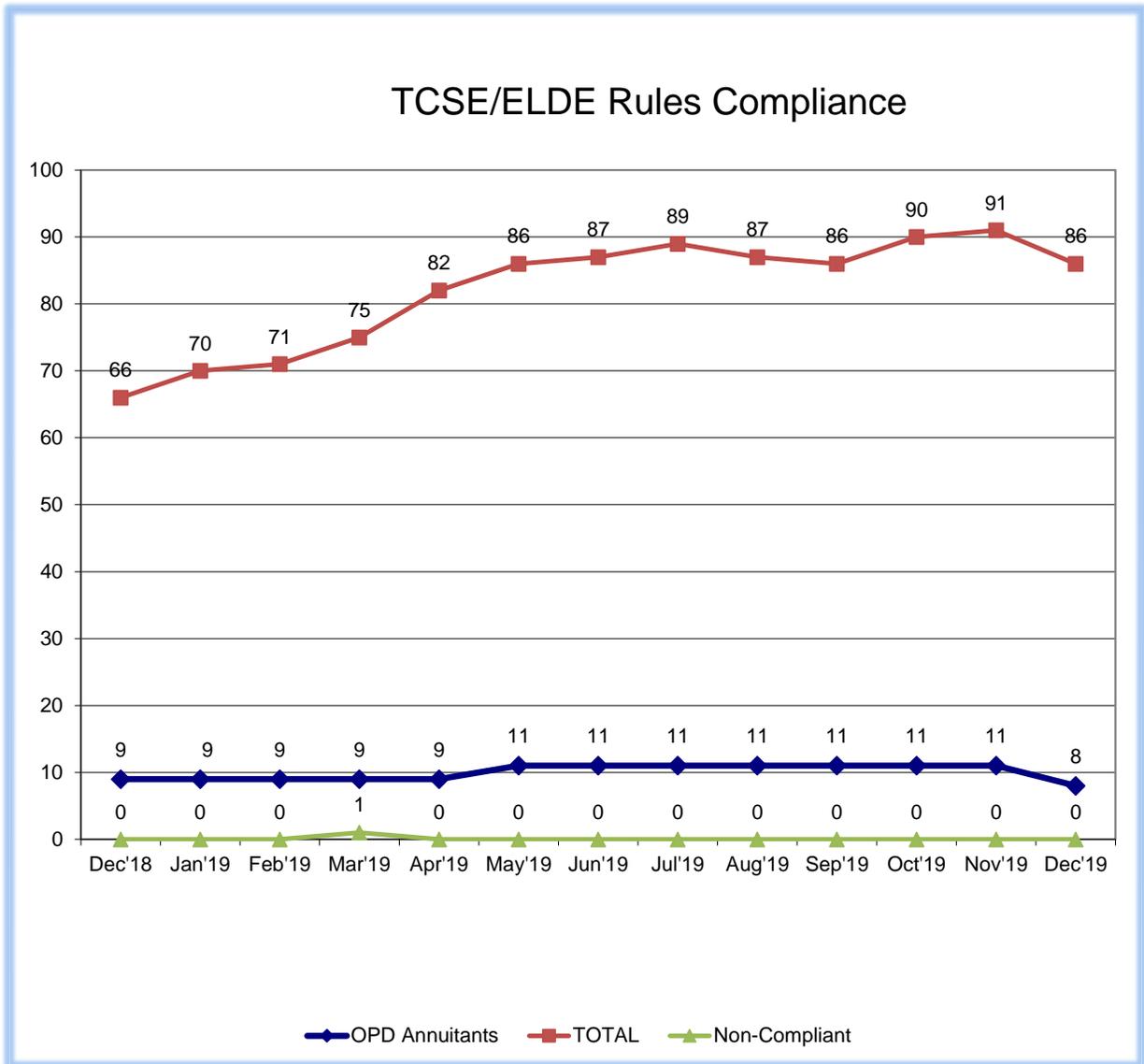
DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
HOUSING & COMMUNITY DEV.	Lothlen	Brittni	89969 - Housing & Community Development	9/10/2019	ELDE		Temporary critical assistance to maintain operations in the Rent Adjustment Program	COMPLIANT
HOUSING & COMMUNITY DEV.	Perez-Pacheco	Guadalupe	89939 - Municipal Lending	5/18/2019	TCSE	627.33	Urgent temporary assistance in the Housing Resource Center	COMPLIANT
HOUSING & COMMUNITY DEV.	Thompson	Norma	89929 - Housing Development	4/17/2019	TCSE/ Annuitant	231.5	Temporary 6 month assignment to help train staff as Housing Development Services Manager	COMPLIANT
HUMAN RESOURCES MGMT.	Li	Wei	05211 - Employment and Classification	8/26/2019	ELDE		Temporary project to integrate the Oracle benefits system.	COMPLIANT
HUMAN RESOURCES MGMT.	Look	Daryl	05211 - Human Resources Management	9/24/2018	TCSE/ Annuitant	287	Temporary staffing to support classification and recruitment needs for city operations	COMPLIANT
HUMAN SERVICES	Breedlove	Jaqueline	75231 - Multipurpose Senior Service Program	2/24/2018	TCSE/ Annuitant	0	Provide training to new Case managers and complete procedural manual for future reference per funder's mandate	COMPLIANT
HUMAN SERVICES	Bouey	Martina	78235 - HS Central Office Administration	7/27/2019	ELDE		Critical support to the Assistant Human Services Director during transitional period	COMPLIANT
HUMAN SERVICES	Decuir	Roslynn	78241 - Year Round Lunch Program Unit	5/23/2016	TCSE	0	PT Food Program Coordinator; intermittent, pending creation of PT class; HRM staff pending release; no direct reports	COMPLIANT
HUMAN SERVICES	Ho	Kathy	78231 - HS Classroom & Seasonal	1/13/2018	TCSE/ Annuitant	249.5	Temporary Assistance as Head Start Substitute Teacher	COMPLIANT
HUMAN SERVICES	Jew	Jeanne	78199 - DHS Fiscal Unit	8/10/2019	TCSE/ Annuitant	315.5	Temporary assistance to help train new hires	COMPLIANT
HUMAN SERVICES	Shelton	Susan	78411 - Community Housing Services	9/11/2017	TCSE/ Annuitant	75	Temporary project: plan, facilitate and update Oakland Homeless Strategy	COMPLIANT
INFORMATION TECHNOLOGY	Geary	Theodore	46111 - Administrative Services	8/3/2019	TCSE	359.5	Temporary project to analyze, design, develop and test software enhancements to	COMPLIANT
INFORMATION TECHNOLOGY	Williams	Mheret	46121 - Reprographic Services	7/8/2019	ELDE		Temporary assignment to assist with critical reprographic projects	COMPLIANT
LIBRARY	Lopez	Jane	61132 - Children's Services/Youth Room	5/4/2019	TCSE/ Annuitant	64	Temporary assignment to help fill staffing gaps at Main Library.	COMPLIANT
LIBRARY	Willhalm	Laurie	61132 - Children Services/Youth Room	4/7/2019	TCSE/ Annuitant	369.5	Temporary assignment to help fill staffing gaps during Library expanded hours (Children's Librarian)	COMPLIANT
PLANNING & BUILDING	Borjon	Agustin	84229 - Zoning	2/27/2017	TCSE/ Annuitant	376	Time-limited project; temp assistance with backlog of permits	COMPLIANT
PLANNING & BUILDING	Lehmer-Chang	Aaron	84111 - Admin: Planning & Building	6/1/2019	ELDE		Temporary project to support the planning, coordinating, implementation and evaluation of external web publications	COMPLIANT
PLANNING & BUILDING	Mason	Melvin	84412 - Admin: Building Inspection	4/6/2019	ELDE		Temporary assistance to process building permit inspections, extensions, and other high priority projects	COMPLIANT
PLANNING & BUILDING	Neri	Kevin	84412 - Admin: Building Inspection	4/6/2019	ELDE		Temporary assistance to process building permit inspections, extensions, and other high priority projects	COMPLIANT
PLANNING & BUILDING	Palmer	Ken	84451 - Inspections: Commercial Building	3/23/2019	TCSE/ Annuitant	216	Temporary assistance with back-log of inspections.	COMPLIANT
PLANNING & BUILDING	Stanley	Brandon	84412 - Admin: Building Inspection	4/7/2019	ELDE		Temporary assistance to process building permit inspections, extensions, and other high priority projects	COMPLIANT
POLICE	Bazile	Luc	106210 - Police Personnel	1/12/2019	ELDE		Temporary, urgent support as departmental Mail Courier; duties not yet fully defined	COMPLIANT
POLICE	Covington	Donald	106610 - Background & Recruiting	4/23/2018	TCSE/ Annuitant	65	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT

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DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
POLICE	Gray	Steve	106610 - Background & Recruiting	7/17/2017	TCSE/ Annuitant	20	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Hicks	Mark	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	48	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Johnson	Carmen	106610 - Background & Recruiting	1/18/2014	TCSE/ Annuitant	467.5	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Lighten	Ronald	106610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	465	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Long	Jacqueline	108630 - Ceasefire	12/31/2018	ELDE		Temporary assistance to complete the OPD Ceasefire Unit Project	COMPLIANT
POLICE	Mestas	Alfred	100610 - Background & Recruiting	1/27/2018	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
PUBLIC WORKS	Pierce	Brittany	30551 - Facilities Administration	10/5/2019	TCSE	150	Temporary appointment to assist with backlogged, complex clerical and admin support duties	COMPLIANT
POLICE	Pressnell	Edward	100610 - Background & Recruiting	9/23/2013	TCSE/ Annuitant	303.5	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
POLICE	Quintero	Joseph	106610 - Background & Recruiting	10/12/2013	TCSE/ Annuitant	0	Per MOU Agreement; TCSE/ Annuitant supporting OPD backgrounding.	COMPLIANT
PUBLIC WORKS	Casilang	Chris	30541 - Equipment Services Administration	4/20/2019	TCSE	607.5	Temporary assistance with excess work load in the Heavy Equipment shop.	COMPLIANT
PUBLIC WORKS	Chambers	Jason	30541 - Equipment Services	9/21/2019	TCSE	80	Temporary assistance to repair essential vehicles utilized for emergency services by the Police, Fire and Public Works depts.	COMPLIANT
PUBLIC WORKS	Chavez	Humberto	30542 - Equipment Services	9/10/2019	TCSE	114.5	Temporary assistance to repair essential vehicles utilized for emergency services by the Police, Fire and Public Works depts.	COMPLIANT
PUBLIC WORKS	Clark	Brazile	30683 - Environmental Services - Environment Remediation	3/9/2019	ELDE		Temporary assignment to the "Environmental Stewardship Team" to help administer Earth Day - Creek To Bay and M.I.D. Days of	COMPLIANT
PUBLIC WORKS	Hernandez	Raul	30244 - Sanitary Sewer Design	3/25/2019	ELDE		Temporary assignment to assist with the City's Private Sewer Lateral (PSL) program.	COMPLIANT
PUBLIC WORKS	Jones	Sabrina	30131 - Public Works Administration	5/18/2019	ELDE		Temporary project to manage Oakland 311Call center transition to a shared-service	COMPLIANT
PUBLIC WORKS	Kelly	Kara	30241 - Engineering Design	9/7/2019	TCSE	196	Temporary assistance to help administer the Watershed and Stormwater Management programs	COMPLIANT
PUBLIC WORKS	Kuvetakis	Joseph	30541 - Equipment Services Division	1/2/2019	TCSE/ Annuitant	514	Temporary assistance with maintenance and repairs of specialized vehicles in the Heavy	COMPLIANT
PUBLIC WORKS	Lai	Jimmy	30541 - Equipment Services	9/21/2019	TCSE	240	Temporary assistance to repair essential vehicles utilized for emergency services by the Police, Fire and Public Works depts.	COMPLIANT
PUBLIC WORKS	Lew	Mi Kyung	30234 - Facilities Planning & Development	2/23/2019	ELDE		Temporary support with delay or services and assist with back-log of important projects	COMPLIANT
PUBLIC WORKS	Nguyen	Hoang	30542 - Equipment Services	9/22/2019	TCSE	240	Temporary assistance to repair essential vehicles utilized for emergency services by the Police, Fire and Public Works depts.	COMPLIANT
PUBLIC WORKS	Pschirrer	Kelly	30533 - Sewer System Maintenance	3/9/2019	ELDE		Special project in the planning and execution of the "Public Works University" - duties not yet fully defined.	COMPLIANT
PUBLIC WORKS	Rodgers	Bobbie	30112 - Public Works Administration	5/18/2019	TCSE	606	Temporary special projects to support the expansion of the Oakland 311 Call Center	COMPLIANT
PUBLIC WORKS	Smith	Ayana	30541 - Equipment Services Administration	3/23/2019	TCSE	610.5	Temporary assignment to assist in the specialized Equipment Services Unit	COMPLIANT

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DEPT	LAST_NAME	FIRST_NAME	ORG	JOB_DATE	TYPE	HOURS	NOTES	STATUS
PUBLIC WORKS	Stern	Jennifer	30245 - Watershed & Storm Water Program	12/1/2018	ELDE		Temporary assistance to provide regulatory compliance & critical storm water response services	COMPLIANT
PUBLIC WORKS	Vargas	Abel	30542 - Equipment Services	7/1/2019	TCSE/ Annuitant	312	Temporary assistance to repair essential vehicles utilized for emergency services by the Police, Fire and Public Works depts	COMPLIANT
PUBLIC WORKS	Weed	Jonelyn	30111 - Director & Human Resources Unit	12/16/2017	TCSE/ Annuitant	101.5	Temporary support to help develop and facilitate Department Strategic Action Plan	COMPLIANT
<b>Non-Compliant (0)</b>								





December 3, 2019

Point Factor Analysis –  
Classification Comparison –  
General, Administrative, Clerical,  
and Office Occupational  
Grouping

Draft Report

Port of Oakland/City of Oakland

**KOFF & ASSOCIATES**

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## **APPENDICES**

Appendix I: Factor Evaluation System Description

Appendix II: Classification Comparability Analysis



# Point Factor Analysis – Classification Comparison – General, Administrative, Clerical, & Office Occupational Grouping – Draft Report Port of Oakland

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## EXECUTIVE SUMMARY

### Background

In January 2016, the Port of Oakland (“Port”) contracted with Koff & Associates (“K&A”) to conduct a comparative classification study to compare approximately three hundred (300) of the Port’s classifications to approximately three hundred (300) classifications in the City of Oakland’s (“City”) classification system. This classification review process was precipitated by the interest of the Civil Service Board in determining if the list of common classes found in Appendix B of the Personnel Manual of the Civil Service Board (also referred to as Civil Service Rules) has the potential of being expanded to include additional common classifications between the two classification systems.

The goal of the comparison classification study is:

- To analyze the Port of Oakland’s approximately three hundred (300) existing classifications through a comprehensive review of existing classification descriptions;
- To analyze the City of Oakland’s approximately three hundred (300) corresponding classifications through a comprehensive review of existing classification descriptions;
- To compare the Port’s and City’s classifications to determine if there are classifications within the respective agencies’ classification systems that are sufficiently similar in the nature and complexity of the duties performed, scope of responsibility, and qualifications required to be identified as common classifications in Appendix B of the Civil Service Rules.

K&A proposed a rating system by which to assign scores to each classification in order to facilitate an objective numerical comparison of each of the Port’s classifications to the corresponding City classification. The system utilizes six factors (identified and defined in the section of this report entitled “Point Factor Analysis”) on which to rate classifications and derive a numerical score for each. At the direction of the Port and City, monthly salary and salary differential information has been included in this report for informational purposes, but were not used as a factor by which commonality was rated. Following the Port, City, and Civil Service Board’s review of K&A’s proposed rating system, analysis commenced in January 2018.



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## CLASSIFICATION COMPARISON STUDY PROCESS

### Occupational Groupings

K&A employed the use of occupational groupings whereby classifications were grouped into categories based on bodies of work in order to identify which classifications may be performing the same or substantively similar work. The occupational groupings and the approximate number of Port and City classes within each grouping can be found in Table 1.

**Table 1. Occupational Groupings**

Occupational Grouping	Approximate Number of Port Classifications	Approximate Number of City Classifications
Human Resources Management	9	26
<b><i>General Administrative, Clerical and Office (including graphics and production)</i></b>	<b>28</b>	<b>36</b>
Accounting and Budget	17	28
Engineering, Architecture, Planning and Permitting	45	33
Information Technology	20	34
Business and industry (including purchasing, contracts, marketing, workers' compensation, property management and public affairs)	20	14
Inspection, Investigation, Enforcement, Compliance	6	9
Trades	37	52

K&A was directed to analyze and report findings on the Accounting and Budget occupational grouping first, followed by periodic analysis and reporting on each of the remaining occupational groupings.



## Point Factor Analysis – Classification Comparison – General, Administrative, Clerical, & Office Occupational Grouping – Draft Report Port of Oakland

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### Point Factor Analysis

In order to develop a numerical score for each classification, K&A utilized the Factor Evaluation System (FES) to assign ratings to each classification based on the following six (6) factors:

- **Comparability** – Based on the broad comparability of the first ten (10) duty statements in each classification specification.
- **Knowledge required** – Measures the nature and extent of information or facts that an employee must understand to do acceptable work (e.g., steps, procedures, practices, rules, policies, theories, principles, and concepts) and the nature and extent of the skills needed to apply this knowledge.
- **Supervisory controls** – The nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility, and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.
- **Guidelines** – The nature of guidelines and the judgment needed to apply them. Guides used in occupations may include desk manuals, established procedures and policies, traditional practices, and reference materials.
- **Complexity** – The nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done, and the difficulty and originality involved in performing the work.
- **Scope and Effect** – The relationship between the nature of the work (i.e., the purpose, breadth, and depth of the assignment) and the effect of the work products or services both within and outside of the organization.

Within each factor, there are several levels with defined criteria for each level and a corresponding point value. A complete description of each factor along with the levels, criteria, and points are provided in Appendix I.

Each classification was rated and assigned a score for each factor based on the information provided in the class specifications, and the individual factor scores were totaled to reach a final score for each classification. Final scores for classifications with the same or similar titles in the Port and the City were compared to determine the likeness of the classifications. Generally, classifications with scores within ten percent (10%) of each other are considered to have significant overlap in function, roles, and responsibilities and are sufficiently similar to be identified as common classifications.



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## FINDINGS

### Comparison Classifications: General, Administrative, Clerical, & Office Occupational Group

Tables 2 and 3 display the Port and City classifications, respectively, that are categorized in the General, Administrative, Clerical, & Office occupational grouping. Each of the Port’s classifications was evaluated to determine whether there is a potential comparison classification at the City, and the findings of this evaluation are included in the following tables.

**Table 2. Port Classifications – General, Administrative, Clerical, & Office Occupational Grouping**

Port Classification Title	Potential Comparable Class – City
Administrative Analyst II	Administrative Analyst II
Administrative Specialist	Administrative Assistant II
Assistant Port Construction Administrator	No Comparable Classification
Associate Port Strategic Planner	No Comparable Classification
Building Services Assistant	No Comparable Classification
Engineering Document Control Specialist	No Comparable Classification
Executive Assistant	-Executive Assistant to the Director -Executive Assistant to the Assistant City Attorney -Executive Assistant to the City Administrator
Executive Assistant II	-Executive Assistant to the Director -Executive Assistant to the Assistant City Attorney -Executive Assistant to the City Administrator
Principal Assistant to the Executive Director	-Management Assistant -Administrative Analyst II -Executive Assistant to the Director
Executive Legal Secretary II	Legal Administrative Assistant
Government Affairs Assistant	No Comparable Classification
Government Affairs Specialist	No Comparable Classification
Management Assistant	Management Assistant



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Office Specialist I	-Office Assistant II -Receptionist -Data Entry Operator
Office Specialist II	-Office Assistant II -Administrative Assistant I -Senior Data Entry Operator
Operations/Procedures Analyst	No Comparable Classification
Organizational Effectiveness Manager	No Comparable Classification
Port Assistant Management Analyst	No Comparable Classification
Port Construction Admin	No Comparable Classification
Port Equal Opportunity Officer	No Comparable Classification
Research Technician	No Comparable Classification
Senior Port Strategic Planner	No Comparable Classification
Senior Project Administrator	No Comparable Classification
Telephone Operator	Fire Communications Dispatcher
Senior Telephone Operator	No Comparable Classification
Relieve Telephone Operator	No Comparable Classification
Port Reprographic Equipment Operator	No Comparable Classification
Port Lead Reprographic Equipment Operator	Reprographic Shop Supervisor

**Table 3. City Classifications – General, Administrative, Clerical, & Office Occupational Grouping**

City Classification Title	Potential Comparable Class – Port
Administrative Assistant I	Office Specialist II
Administrative Assistant II	Administrative Specialist
Administrative Analyst I	No Comparable Classification
Administrative Analyst II	-Administrative Analyst II -Principal Assistant to the Executive Director
Administrative Services Manager I	No Comparable Classification



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City Classification Title	Potential Comparable Class – Port
Administrative Services Manager II	No Comparable Classification
Assistant to the Director	No Comparable Classification
Executive Assistant to the Director	-Executive Assistant I -Executive Assistant II
Executive Assistant to the City Attorney	No Comparable Classification
Executive Assistant to the Assistant City Attorney	-Executive Assistant I -Executive Assistant II
Executive Assistant to the City Administrator	-Executive Assistant I -Executive Assistant II
Data Entry Operator	Office Specialist I
Senior Data Entry Operator	Office Specialist II
Receptionist	Office Specialist I
Office Assistant I	No Comparable Classification
Office Assistant II	-Office Specialist I -Office Specialist II
Office Manager	No Comparable Classification
Management Assistant	-Management Assistant -Principal Assistant to the Executive Director
Legal Administrative Assistant	Executive Legal Secretary II
Supervising Legal Administrative Assistant	No Comparable Classification
Legal Support Supervisor	No Comparable Classification
Legal Administrative Services Manager	No Comparable Classification
Paralegal	No Comparable Classification
Open Government Coordinator	No Comparable Classification
Program Analyst I	No Comparable Classification
Program Analyst II	No Comparable Classification
Program Analyst III	No Comparable Classification
Project Manager	No Comparable Classification
Project Manager II	No Comparable Classification



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City Classification Title	Potential Comparable Class – Port
Project Manager III	No Comparable Classification
Reprographic Shop Supervisor	Port Lead Reprographic Equipment Operator
Support Services Supervisor	No Comparable Classification
Grant Coordinator	No Comparable Classification
Fire Communications Dispatcher	Telephone Operator

Following the identification of potential comparable classifications, we conducted a comprehensive evaluation of the classification specifications and rated each classification using the FES criteria and point values. Once point values were established for each classification, the values for each potential comparable class within the Port and City classification systems were compared to determine likeness between the classifications.

In some cases, we identified more than one potential match based on class title, and in those instances, we conducted a cursory review to determine if scoring comparison between the classifications was appropriate. In some instances, the cursory review revealed that a deeper comparison was not necessary (e.g., one class may be identified as entry level and another as journey level and qualification requirements were consistent with the level identified, in which case comparison scoring is not necessary). In other instances, cursory review did not eliminate the need for a deeper comparison and therefore a scoring comparison was conducted.

### Comparability Scoring: General, Administrative, Clerical, & Office Group

Detailed scoring information for each classification can be found in Appendix II of this report. Table 4 provides a summary of the findings.



**Point Factor Analysis – Classification Comparison –  
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**Table 4. Analysis Summary**

<b>City Classification</b>	<b>Score</b>	<b>Port Classification</b>	<b>Score</b>	<b>Point Value Differential</b>	<b>Percentage Differential</b>
Administrative Analyst II	2350	Administrative Analyst II	2350	0	0%
Management Assistant	2250	Management Assistant	2375	125	5.5%
Management Assistant	2550	Principal Assistant to the Executive Director	3300	750	29%
Executive Assistant to the Director	1025	Executive Assistant	1025	0	0%
Executive Assistant to the Director	1025	Executive Assistant II	1025	0	0%
Executive Assistant to the Assistant City Attorney	1025	Executive Assistant I	1025	0	0%
Executive Assistant to the Assistant City Attorney	1025	Executive Assistant II	1025	0	0%
Executive Assistant to the City Administrator	1325	Executive Assistant II	1325	0	0%
Legal Administrative Assistant	1000	Executive Legal Secretary II	1300	300	30%
Office Assistant II	950	Office Specialist I	850	100	11.8%
Office Assistant II	950	Office Specialist II	1100	150	15.8%
Administrative Assistant I	1250	Office Specialist II	1100	150	13.6%
Administrative Assistant II	2075	Administrative Specialist	2075	0	0%
Fire Communications Senior Dispatcher	875	Senior Telephone Operator	725	150	21%
Reprographic Shop Supervisor	1250	Port Lead Reprographic Equipment Operator	1075	175	16.3%



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While based on title alone it may appear that some classifications ought to be comparable, upon initial review, the duty statements did not align sufficiently to consider the classifications comparable for scoring purposes. For example, Office Assistant I and Office Specialist I; Office Assistant I is a more specialized classification that does not perform the same breadth of general clerical work that the Office Specialist performs. Using the FES model developed for the study, there were not enough duty statements in common to warrant scoring. Given that the scoring methodology was solely based on the job descriptions alone, there may be more information to consider that was not available for this study. Ultimately, the Port’s Office Specialist I as written is a higher-level classification with more scope than the City’s Office Assistant I and the determination was that the classes are not substantially similar despite the titling.

The Office Assistant and Office Specialist series are more closely aligned than the scoring indicates due to the possibility that the degree of supervision received may not be accurate in the Office Assistant series. As such, the scoring is slightly outside of the 10% range; however, further analysis would determine the full extent of alignment. The same is true of the Administrative Assistant series.

In general, those classifications with a ten percent (10%) or less differential between scores are considered sufficiently similar and may be identified as common classes.

Table 5 provides a crosswalk of the City and Port classifications which we believe are sufficiently similar to be identified as common classes based on the final scores of each.

**Table 5. Crosswalk of Similar Classifications**

<b>City Classification</b>	<b>Monthly Salary</b>	<b>Port Classification</b>	<b>Maximum Monthly Salary</b>	<b>PFA Score Differential</b>	<b>Salary Differential</b>
Administrative Analyst II	\$7,939	Administrative Analyst II	\$10,695	0%	34.7%
Management Assistant	\$9,009	Management Assistant	\$12,146	5.5%	34.8%
Executive Assistant to the Director	\$7,266	Executive Assistant	\$8,840	0%	21.7%
Executive Assistant to the Director	\$7,266	Executive Assistant II	\$9,422	0%	29.7%



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City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Executive Assistant to the Assistant City Attorney	\$7,631	Executive Assistant I	\$8,840	0%	15.8%
Executive Assistant to the Assistant City Attorney	\$7,631	Executive Assistant II	\$9,422	0%	23.5%
Executive Assistant to the City Administrator	\$9,617	Executive Assistant II	\$9,422	0%	2.1%
Administrative Assistant II	\$5,864	Administrative Specialist	\$8,451	0%	44.1%

It is important to note that the analysis for this study is confined to the content of the classification descriptions and did not include obtaining information from classification incumbents or the assumption of duties and responsibilities outside of that which is provided in the classification description. To this end, Table 6 provides a list of classifications that we believe are likely sufficiently similar to be identified as common classes, but the classification descriptions are written such that the scores for the classifications do not reflect this similarity.

**Table 6. Potentially Similar Classifications**

City Classification	Port Classification	Discussion
Legal Administrative Assistant (\$6,636)	Executive Legal Secretary II (\$9,933)	The Port also has an Executive Legal Secretary I, but it appears that only the Executive Legal Secretary II classification is being used. The overall purpose and function of the class series is similar to that of the City’s Legal Administrative Assistant. The differential of 30% is due to the



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City Classification	Port Classification	Discussion
		supervisory controls and guidelines used by the Executive Legal Secretary II, which may be overstated. A more in-depth job analysis of the series involving the subject matter experts would allow for further discernment.
Office Assistant II (\$4,503)	Office Specialist I (\$6,273)	The score is at an 11.8% differential due to the difference in stated supervisory control; however, it is possible that the supervisory control is overstated in the Office Assistant II description. Further analysis to determine the accuracy of the supervisory control and other elements is warranted. If the two have the same supervisory control, the differential would be 0%.
Office Assistant II (\$4,503)	Office Specialist II (\$7,184)	The final score is at a differential of 15.8%; however, this is based on the knowledge level required of the Office Specialist II being stated at a higher level. Further analysis would help determine if the knowledge level required is accurate or overstated due to the necessity to align with the knowledge level stated by the lower level job description; if determined the same, the differential would be 0%.
Administrative Assistant I (\$5,228)	Office Specialist II (\$7,184)	The differential of 13.6% is based on supervisory control; Administrative Assistant I description includes the statement that it may lead. However, may lead is unclear when it comes to scoring as the word “may” does not provide a definitive answer regarding whether the classification is a lead level. Further analysis would provide clarity, as the differential would otherwise be 0%.
Reprographic Shop Supervisor (\$6,981)	Port Lead Reprographic Equipment Operator (\$8,077)	Scoring between these two classifications varied on several categories, but the final differential was only 16.3%. It is difficult to discern the accuracy of these two classifications with the



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City Classification	Port Classification	Discussion
		current job descriptions. Further analysis could determine a higher degree of comparability.

### Next Steps

It is our assessment that the Port and the City can implement the addition of those classification pairings with a differential of five percent (5%) or less to Appendix B of the Civil Service Rules based on information provided in the classification specification. These classifications can be found in Table 7.

**Table 7. Potentially Similar Classifications**

City Classification	Port Classification
Administrative Analyst II	Administrative Analyst II
Management Assistant	Management Assistant
Executive Assistant to the Director	Executive Assistant I/II
Executive Assistant to the Assistant City Attorney	Executive Assistant I/II
Executive Assistant to the City Administrator	Executive Assistant II
Administrative Assistant II	Administrative Specialist

We recommend further analysis of the classifications listed in Table 6 to determine the similarity between the classifications based on what we believe to be potentially inaccurate information in the classification description as it relates to the supervisory controls of the classes.

## CONCLUSION

It has been a pleasure working with Port on this critical project. Once you have had the opportunity to review this draft report, please let us know if you have questions or need clarification on any of the information contained herein.



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Respectfully submitted by,  
**Koff & Associates**

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

Georg Krammer  
Chief Executive Officer



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## **Appendix I**

### Factor Evaluation System Description

## Port of Oakland Classification Equivalency Study

### Study Goal

- Determine the extent of documented differences between job classifications in the City of Oakland and the counterpart classification in the Port of Oakland.
- Articulate differences in a manner which can be recognized and evaluated by multiple stakeholders including unions and the Civil Service Commission.
  - Whole job narrative would be complicated and less likely to be accepted; would be open to multiple challenges which would be difficult to respond to.
  - Quantitative analysis may be more acceptable to all stakeholders provided there is a validated basis to the analysis.
    - Would still be open to challenge, but factor comparability can be more readily communicated than whole job narrative.
- Port wishes to have an evaluation of direct comparability of duties and statements within the classifications specifications weighted heavily in the process.

### Study Approach/Broad Based/Factor Based

- Broad based – measure comparability of duty statements within the classification specifications to determine what percentage are sufficiently similar
  - Involves an interpretation of statements and conclusions as their comparability
- Factor based – use the Federal Government’s Factor Evaluation System (FES) as the basis for evaluating specific factors which are key to determining compensability within the Federal System, and which can also be used to evaluate the “likeness” of jobs.
  - Factors will need to be applied to content of the classification specifications; thus the evaluation is more limited to classification content which can be used to measure these factors

### Study Challenges/Pros and Cons

- Content of classification specifications may be difficult to work with if they are inaccurately written or do not provide strong insights in the nature and level of work assigned to the classification.
- Some factors (e.g. Guidelines) will require consultants to make assumptions on the use of desk manuals, SOP’s, professional practices consistent with either industry standard or best practices.
- Consultants will need to make judgment calls on aspects of the class specs (e.g. when using ten duties, and there are two similar duties in the top ten, may increase the level to eleven)
- Consultants will need to be consistent in factor evaluation, even if it is clear that the classification specification is incorrect (e.g. level of supervision received is higher than one would expect)
  - Koff and Associates can call out these differences.

- Rater bias/consistency among multiple factors
  - Koff and Associates will use a norming process to mitigate this
- Quantitative analysis can bring more validity to the process
- Port and City should consider how/whether this data will be communicated and what overall impact it will have on public and employee perception of work and pay equity in the City and Port.

## Factor Evaluation Framework

### Factors Based upon the Federal Factor Evaluation System (FES) used for General Schedule Occupations – Professional, Administrative, Technical and Clerical

#### Factors to be Evaluated

- Comparability of Duties and Responsibilities (Not used in FES)
- Knowledge Required by the Position
- Supervisory Controls (RECEIVED NOT EXERCISED)
- Guidelines
- Complexity
- Scope and Effect

#### FES Factors Not Used

- Personal Contacts
- Purpose of Contacts
- Physical Demands
- Work Environment
- Supervisory – this measurement is used in a different scale for supervisory and management positions- would require knowledge beyond that which is in the classification specification; however, we will identify for each class what type of supervision, if any, is exercised, but will not measure it. Since we are comparing like classes, it is unlikely that lack of a numerical value will impact the outcome.

## City of Oakland/Port of Oakland Comparability of Duties and Responsibilities

### Based Upon Broad Comparability First Ten Duty Statements in Class Specification

<b>Level</b>	<b>Measure</b>	<b>Points</b>	<b>Comments</b>
Comp-1	Two (2) of ten statements are sufficiently similar as to be comparable	50	Same points as Level 1 of Knowledge Matrix
Comp-2	Four (4) of ten statements are sufficiently similar as to be comparable	350	Same points as Level 3 of Knowledge Matrix
Comp-3	Six (6) of ten statements are sufficiently similar as to be comparable	750	Same points as Level 5 of Knowledge Matrix
Comp-4	Eight (8) of ten statements are sufficiently similar as to be comparable	1250	Same points as Level 7 of Knowledge Matrix
Comp-5	Ten (10) of ten statements are sufficiently similar as to be comparable	1850	Same points as Level 9 of Knowledge Matrix

- Sufficiently similar means that, although the duties may be written differently, a reasonable conclusion can be drawn that the statements are comparable, based upon the intent of the overall statements.
- Requires an objective interpretation, but may be perceived as subjective.

## FES Factor 1 - Knowledge Required by the Position

Measures the nature and extent of information or facts that a worker must understand to do acceptable work, e.g., steps, procedures, practices, rules, policies, theories, principles and concepts, and the nature and extent of the skills needed to apply this knowledge. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

Level	Description	Points
1-1	<p>Knowledge of simple, routine or repetitive tasks or operations that typically include following step-by-step instructions and require little or no previous training or experience;</p> <p style="text-align: center;"><b>OR</b></p> <p>Skill to operate simple equipment or equipment that operates repetitively and requires little or no previous training or experience;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	50
1-2	<p>Knowledge of basic or commonly used rules, procedures or operations that typically require some previous training or experience;</p> <p style="text-align: center;"><b>OR</b></p> <p>Basic skill to operate equipment requiring some previous training or experience, such as keyboard equipment;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	200
1-3	<p>Knowledge of a body of standardized rules, procedures and operations that require considerable training and experience to perform the full range of standard clerical assignments and resolve recurring problems;</p> <p style="text-align: center;"><b>OR</b></p> <p>Skill acquired through considerable training and experience, to operate and adjust varied equipment for purposes such as performing numerous standardized tests or operations;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	350
1-4	<p>Knowledge of an extensive body of rules, procedures or operations that require extended training and experience to perform a wide variety of interrelated or non-standard procedural assignments and resolve a wide range of problems;</p> <p style="text-align: center;"><b>OR</b></p> <p>Practical knowledge of standard procedures in a technical field, requiring extended training or experience, to perform such work as adapting equipment when this requires consideration of the functioning characteristics of equipment; interpreting results of tests based on previous experience and observations (rather than directly reading instruments or other measures); or extracting information from various sources when this requires considering the applicability of the information and characteristics and quality of the sources;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	550
1-5	<p>Knowledge (such as would be acquired through pertinent education, experience, training or independent study), of basic principles, concepts, and methodology of a professional or administrative occupation, and skill in</p>	750

Level	Description	Points
	<p>applying this knowledge in carrying out elementary assignments, operations, or procedures;</p> <p style="text-align: center;"><b>OR</b></p> <p>In addition to the practical knowledge of standards 1-4, practical knowledge of technical methods to perform assignments such as carrying out limited projects that involve use of specialized complicated techniques;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	
1-6	<p>Knowledge of the principles, concepts and methodology of a professional or administrative occupation as described in Level 1-5 that has either been (a) supplemented by skill gained through job experience to permit independent performance of recurring assignments, or (b) supplemented by expanded professional or administrative knowledge gained through relevant education or experience, that has provided skill in carrying out assignments, operations and procedures that are significantly more difficult and complex than those covered by level 1-5;</p> <p style="text-align: center;"><b>OR</b></p> <p>Practical knowledge of a wide range of technical methods, principles and practices similar to a narrow area of a professional field; and skill in applying this knowledge to such assignments as the design and planning of difficult, but well precedented projects;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	950
1-7	<p>Knowledge of a wide range of concepts, principles and practices of a professional or administrative occupation, such as would be gained through extended study or experience, and skill in applying this knowledge to difficult and complex work assignments;</p> <p style="text-align: center;"><b>OR</b></p> <p>A comprehensive, intensive, practical knowledge of a technical field, and skill in applying this knowledge to the development of new methods, approaches or procedures.</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	1,250
1-8	<p>Mastery of a professional or administrative field to:</p> <ul style="list-style-type: none"> <li>• Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods;</li> </ul> <p style="text-align: center;"><b>OR</b></p> <ul style="list-style-type: none"> <li>• Make decisions or recommendations significantly changing, interpreting, or developing important public policies or programs;</li> </ul> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	1,550
1-9	<p>Mastery of a professional field to generate and develop new hypotheses and theories;</p> <p style="text-align: center;"><b>OR</b></p> <p>Equivalent knowledge and skill.</p>	1,850

## FES Factor 2 - Supervisory Controls

Supervisory controls cover the nature and extent of direct or indirect controls exercised by the supervisor, the employee’s responsibility and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined.

Responsibility of the employee depends on the extent to which the employee is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing the priorities and defining objectives. The degree of review of completed work depends on the nature and extent of the review, e.g., close and detailed review of each phase of the assignment, detailed review of the finished assignment, spot-check of finished work for accuracy, or review for adherence to policy.

Level	Description	Points
2-1	<p>For both one-of-a-kind and repetitive tasks, the supervisor makes specific assignments that are accompanied by clear, detailed and specific instructions.</p> <p>The employee works as instructed and consults with the supervisor as needed on all matters not specifically covered in the original instructions or guidelines.</p> <p>For all positions the work is closely controlled. For some positions, the control is through the structured nature of the work itself; for others, it may be controlled by the circumstances in which it is performed. In some situations, the supervisor maintains control through review of the work. This may include checking progress or reviewing completed work for accuracy, adequacy, and adherence to instructions and established procedures.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> <li>• Immediate Supervision</li> </ul>	25
2-2	<p>The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments, including suggested work methods of advice on source material available.</p> <p>The employee uses initiative in carrying out recurring assignments independently without specific instructions, but refers deviations, problems and unfamiliar situations not covered by instructions to the supervisor for decision or help.</p> <p>The supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increases with more difficult assignments if the employee has not previously performed similar assignments.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> <li>• General Supervision</li> </ul>	125

Level	Description	Points
2-3	<p>The supervisor makes assignments by defining objectives, priorities and deadlines and assists the employee with unusual situations that do not have clear precedents.</p> <p>The employee plans and carries out the successive steps and handles problems and deviations in the work assignments in accordance with instructions, policies, previous training, or accepted practices in the occupation.</p> <p>Completed work is usually evaluated for technical soundness, appropriateness, and conformity to policy and requirements. The methods used in arriving at the end results are not usually reviewed in detail.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> <li>• Direction</li> </ul>	275
2-4	<p>The supervisor sets the overall objectives and resources available. The employee and supervisor in consultation, develop deadlines, projects and work to be done.</p> <p>The employee, having developed expertise in the line of work, is responsible for planning and carrying out the assignment, resolving most of the conflicts that arise, coordinating the work with others as necessary, and interpreting policy on own initiative in terms of established objectives. In some assignments, the employee also determines the approach to be taken and the methodology to be used. The employee keeps the supervisor informed of progress and potentially controversial matters.</p> <p>Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, or effectiveness in meeting requirements or expected results.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> <li>• General direction</li> </ul>	450
2-5	<p>The supervisor provides administrative direction with assignments in terms of broadly defined missions or functions.</p> <p>The employee has responsibility for independently planning, designing and carrying out programs, projects, studies, or other work.</p> <p>Results of the work are considered technically authoritative and are normally accepted without significant change. If the work should be reviewed, the review concerns such matters as fulfillment of program objectives, effect of advice and influence of the overall program, or the contribution to the advancement of technology. Recommendations for new projects and alterations of objectives usually are elevated for such considerations as availability of funds and other resources, broad program goals, or national priorities.</p> <p>Recommended type of supervision to match for this level:</p> <ul style="list-style-type: none"> <li>• Administrative direction</li> </ul>	650

### FES Factor 3 – Guidelines

This factor covers the nature of guidelines and the judgment needed to apply them. Guides used in occupations include, for example, desk manuals, established procedures and policies, traditional practices and reference materials such as dictionaries, style manuals, engineering handbooks, and pharmacopoeia.

Individual jobs in different occupations vary in the specificity, applicability and availability of guidelines for performance of assignments. Consequently, the constraints and judgmental demands placed on employees may also vary. For example, the absence of specific instructions, procedures and policies may limit the employee’s opportunity to make or recommend decisions, or actions. However, in the absence of procedures under broadly stated objectives, employees in some occupations may use considerable judgment in researching literature and developing new methods.

Guidelines should not be confused with the knowledge described under Factor 1, Knowledge Required by the Position. Guidelines either provide reference data or impose certain constraints on the use of knowledge. For example, in the field of medical technology, for a particular diagnosis, there may be three or four standardized tests set forth in the technical manual. A medical technologist is expected to know these diagnostic tests. However, in a given laboratory, the policy may be to use only one of the tests, or the policy may state specifically under what conditions one or the other of these tests may be used.

Level	Description	Points
3-1	<p>Specific detailed guidelines covering all important aspects of the assignment are provided to the employee.</p> <p>The employee works in strict adherence to guidelines; deviations must be authorized by the supervisor.</p>	25
3-2	<p>Procedures for doing the work have been established, and a number of specific guidelines are available.</p> <p>The number and similarity of guidelines and work situations require the employee to use judgment in locating and selecting the most appropriate guidelines, references and procedures for application and in making minor deviations to adapt the guidelines to specific cases. The employee may also determine which of the several established guidelines to use. Situations to which the existing guidelines cannot be applied or significant proposed deviations from the guidelines are referred to the supervisor.</p>	125
3-3	<p>Guidelines are available but are not completely applicable to the work or have gaps in specificity.</p> <p>The employee uses judgment in interpreting and adapting guidelines, such as agency policies, regulations, precedents, and work directions for application to specific cases or problems. The employee analyzes results and recommends changes.</p>	275
3-4	<p>Administrative policies and precedents are applicable but are stated in general terms. Guidelines for performing the work are scarce or of limited use.</p>	450

Level	Description	Points
	The employee uses initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies.	
3-5	<p>Guidelines are broadly stated and non-specific, e.g., broad policy statements and basic legislation that require extensive interpretation.</p> <p>The employee must use judgment and ingenuity in interpreting the intent of the guides that do exist and in developing applications to specific areas of work. Frequently, the employee is recognized as a technical authority in the development and interpretation of guidelines.</p>	650

## FES Factor 4 - Complexity

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level	Description	Points
4-1	<p>The work comprises of tasks that are clear cut and directly related.</p> <p>There is little or no choice to be made in deciding what needs to be done.</p> <p>Actions to be taken or responses to be made are readily discernible. The work is quickly mastered.</p>	25
4-2	<p>The work consists of duties that involve related steps, processes or methods.</p> <p>The decision regarding what needs to be done involves various choices that require the employee to recognize the existence of, and differences among, a few easily recognizable situations.</p> <p>Actions to be taken, or responses to be made, differ in such things as the source of information, the kind of transactions or entries, or other differences of a factual nature.</p>	75
4-3	<p>The work includes various duties involving different and unrelated processes and methods.</p> <p>The decision regarding what needs to be done depends upon the analysis of the subject, phase or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives.</p> <p>The work involves conditions and elements that must be identified and analyzed to discern interrelationships.</p>	150
4-4	<p>The work typically involves varied duties that require many different and unrelated processes and methods, such as those related to well-established aspects of an administrative or professional field.</p> <p>Decisions regarding what needs to be done include the assessment of unusual circumstances, variations in approach, and incomplete or conflicting data.</p> <p>The work requires making many decisions concerning such things as the interpretation of considerable data, planning of the work, or refinement of the methods and techniques to be used.</p>	225
4-5	<p>The work includes varied duties requiring many different and unrelated processes and methods that are applied to a broad range of activities or substantial depth of analysis, typically for an administrative or professional field.</p> <p>Decisions regarding what needs to be done include major areas of uncertainty in approach, methodology or interpretation and evaluation processes that result from such elements as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.</p>	325

Level	Description	Points
	The work requires originating new techniques, establishing criteria or developing new information.	
4-6	<p>The work consists of broad functions and processes of an administrative or professional field. Assignments are characterized by breadth and intensity of effort and involve several phases pursued concurrently or sequentially with the support of others within or outside the organization.</p> <p>Decisions regarding what needs to be done include largely undefined issues and elements and require extensive probing and analysis to determine the nature and scope of the problems.</p> <p>The work requires continuing efforts to establish concepts, theories, or programs, or to resolve unyielding problems.</p>	450

## FES Factor 5 – Scope and Effect

Scope and Effect covers the relationship between the nature of the work, i.e., the purpose, breadth and depth of the assignment, and the effect of the work products or services both within and outside the organization.

Effect measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or impacts on the adequacy of research conclusions. The concept of effect alone does not provide sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture and allows consistent evaluations. Only the effect of properly performed work is to be considered

Level	Description	Points
5-1	<p>The work involves the performance of specific, routine, operations that include a few separate tasks or procedures.</p> <p>The work or service is required to facilitate the work of others; however, it has little impact beyond the immediate organizational unit or beyond the timely provision of limited services to others.</p>	25
5-2	<p>The work involves the execution of specific rules, regulations or procedures and typically comprises a segment of an assignment or project of broader scope.</p> <p>The work or service product affects the accuracy, reliability, or acceptability of further processes or services.</p>	75
5-3	<p>The work involves treating a variety of conventional problems, questions or situations in conformance with established criteria.</p> <p>The work product or service affects the design or operations of systems, programs or equipment; the adequacy of such activities as field investigations, testing operations, or research conclusions; or the social, physical and economic well being of people.</p>	150
5-4	<p>The work involves establishing criteria; formulating projects; assessing program effectiveness or investigating or analyzing a variety of unusual conditions, problems, or questions.</p> <p>The work product or service affects a wide range of agency activities, major activities or industrial concerns, or the operation of other agencies.</p>	225
5-5	<p>The work involves isolating and defining unknown conditions, resolving critical problems, or developing new theories.</p> <p>The work product or service affects the work of other experts, the development of major aspects of administrative or scientific programs or missions, or the well-being of substantial numbers of people.</p>	325
5-6	<p>The work involves planning, developing, and carrying out vital administrative or scientific programs.</p> <p>The programs are essential to the missions of the agency or affect a large number of people on a long term or continuing basis.</p>	450



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## **Appendix II**

Classification Comparability Analysis  
General, Administrative, Clerical, & Office Occupational  
Grouping

CLASSIFICATION COMPARABILITY ANALYSIS  
General, Administrative, Clerical, Office Services Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
City - Administrative Analyst II	3	750		D	1-5	750	2-2	125	3-3	275	4-4	225	5-4	225	2350	Duties, responsibilities, and qualifications for these classifications are equivalent. Seven of the top ten duty statements are identical. The City's description indicates supervisory-level duties relative to work assignment and evaluation while the Port's duty statements indicate that the class participates in these duties (versus assuming total responsibility for them).
Port - Administrative Analyst II	3	750	N	L	1-5	750	2-2	125	3-3	275	4-4	225	5-4	225		
City - Management Assistant	1	50		D	1-6	950	2-4	450	3-4	450	4-5	325	5-5	325	2550	While the class titles are the same, the duty statements are written differently; however, the class concepts are closely aligned. These classifications are both administrative, responsible for directing staff, and perform duties related to budget, policy development, human resources functions, and performing projects that include analysis and reports.
Port - Management Assistant	1	50	N	L/D	1-6	950	2-3	275	3-4	450	4-5	325	5-5	325	2375	
City - Administrative Analyst II	1	50		D	1-5	750	2-2	125	3-3	275	4-4	225	5-4	225	1650	While the classes have some overlapping duties, they are different level analysts with the Principal position being at a higher level.
Port - Principal Assistant to the Executive Director	1	50	E	L	1-7	1250	2-4	450	3-5	650	4-6	450	5-6	450	3300	
City - Management Assistant	1	50		D	1-6	950	2-4	450	3-4	450	4-5	325	5-5	325	2550	While the classes have some overlapping duty statements, the Principal position at the Port is a higher level assignment.
Port - Principal Assistant to the Executive Director	1	50	E	L	1-7	1250	2-4	450	3-5	650	4-6	450	5-6	450	3300	

Supervision Legend:  
N = None  
L = Lead  
D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS  
General, Administrative, Clerical, Office Services Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
City - Executive Assistant to the Director	1	50		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1025	The Port and the City have different Executive Assistant series. The Port's series is intended to perform administrative duties to include budget work, while the City's position is solely to provide support to the Directors and is a slightly higher level class based on MQs. However, there is significant overlap in these classifications. Each classification may perform as a supervisor over other clerical positions, and the purpose of the classes is predominately to relieve executives of administrative duties. The overall score is the same as a result despite there only being very few common duty statements. The Port's Executive Assistant II is not as comparable because it acts as a specialist in an assigned Port branch and focuses on one area, budget, business operation, and/or operational analysis.
Port - Executive Assistant	1	50	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150		
City - Executive Assistant to the Director	1	50		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1025	While these classes score relatively low on the duty statement comparability factor, they are equivalent in the other factors measured and are substantially similar.
Port - Executive Assistant II	1	50	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1025	
City - Executive Assistant to the Assistant City Attorney	1	50		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1025	These two classifications are substantially the same. The classes are described as being under direction and were scored accordingly.
Port - Executive Assistant	1	50	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150		

Supervision Legend:  
N = None  
L = Lead  
D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS  
General, Administrative, Clerical, Office Services Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
City - Executive Assistant to the Assistant City Attorney	1	50		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1025	As with the other EA classes, these two have a high degree of comparability despite the low number of matching duty statements.
Port - Executive Assistant II	1	50	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150		
City - Executive Assistant to the City Administrator	2	350		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1325	These two classifications are highly comparable except that the Port's class is also responsible for compiling budget documents.
Port - Executive Assistant	2	350	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150		
City - Executive Assistant to the City Administrator	3	750		D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150	1725	These two classifications are substantially similar except that the Port's position is also responsible for compiling budget documents.
Port - Executive Assistant II	3	750	N	D	1-3	350	2-3	275	3-2	125	4-2	75	5-3	150		
City - Legal Administrative Assistant	1	50		N	1-4	550	2-2	125	3-2	125	4-2	75	5-2	75	1000	These two classifications are very similar except that the Port's position is a lead and has some higher level duties.
Port - Executive Legal Secretary II	1	50	E	L	1-4	550	2-3	275	3-3	275	4-2	75	5-2	75		
City - Office Assistant II	2	350		N	1-2	200	2-2	125	3-2	125	4-2	75	5-2	75	950	These classifications are substantially the same; the score in factor 2 is lower for Office Specialist I because it is written as entry level; however, the degree of supervision may be overstated in the Office Assistant II description.
Port - Office Specialist I	2	350	N	N	1-2	200	2-1	25	3-2	125	4-2	75	5-2	75		
City - Office Assistant II	2	350		N	1-2	200	2-2	125	3-2	125	4-2	75	5-2	75	950	These classifications are similar. The OS II appears to be a higher level, but the degree of supervision received in the OA II spec may be overstated.
Port - Office Specialist II	2	350	N	N	1-3	350	2-2	125	3-2	125	4-2	75	5-2	75		

Supervision Legend:  
N = None  
L = Lead  
D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS  
General, Administrative, Clerical, Office Services Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
City - Administrative Assistant I	2	350		L	1-3	350	2-3	275	3-2	125	4-2	75	5-2	75	1250	These classes are similar. The AAI duty statements are repetitive of the OA II with the addition of a of couple tasks. The supervision received may not be accurate, and the AA I may have some lead responsibilities.
Port - Office Specialist II	2	350	N	N	1-3	350	2-2	125	3-2	125	4-2	75	5-2	75	1100	
City - Receptionist	1	50		N	1-1	50	2-2	125	3-2	125	4-1	25	5-1	25	400	These classes are very similar; however, the OSI is a somewhat broader class with a range of clerical duties.
Port - Office Specialist I	1	50	N	N	1-1	50	2-2	125	3-2	125	4-2	75	5-2	75	500	
City - Data Entry Operator	1	50		N	1-1	50	2-1	25	3-1	25	4-1	25	5-2	75	250	There is some overlap in that the OSI class includes data entry functions; however the DEO is specialized and does not perform the broad clerical work.
Port - Office Specialist I	1	50	N	N	1-1	50	2-2	125	3-2	125	4-2	75	5-2	75	500	
City - Senior Data Entry Operator	1	50		N	1-1	50	2-1	25	3-1	25	4-1	25	5-2	75	250	There is some overlap in that the OSII class includes data entry functions; however, the DEO is specialized and does not perform the broad clerical work.
Port - Office Specialist II	1	50	N	N	1-2	200	2-2	125	3-2	125	4-2	75	5-1	25	600	
City - Administrative Assistant II	4	1250		D	1-2	200	2-3	275	3-2	125	4-2	75	5-3	150	2075	These classifications are substantially the same.
Port - Administrative Specialist	4	1250	N	L	1-2	200	2-3	275	3-2	125	4-2	75	5-3	150	2075	
City - Fire Communications Senior Dispatcher	1	50		L	1-3	350	2-2	125	3-2	125	4-2	75	5-3	150	875	These classifications are very different. A Fire Dispatcher is a very specific job while Telephone Operator is a broader

Supervision Legend:  
N = None  
L = Lead  
D = Direct

CLASSIFICATION COMPARABILITY ANALYSIS  
General, Administrative, Clerical, Office Services Grouping

	Comparability				Knowledge		Sup. Controls		Guidelines		Complexity		Scope/Effect		Total Points	Comments
	Level	Points	FLSA	Sup.	Level	Points	Level	Points	Level	Points	Level	Points	Level	Points		
Port - Telephone Operator, Senior	1	50	N	L	1-2	200	2-2	125	3-2	125	4-2	75	5-3	150	<b>725</b>	receptionist role. Dispatchers go through substantial training to perform their work and perform in a highly stressful environment.
City - Reprographic Shop Supervisor	1	50		D	1-3	350	2-3	275	3-3	275	4-2	75	5-4	225	<b>1250</b>	The Port's position is lower level and does not have the full scope of the City's Supervisor position.
Port - Port Lead Reprographic Equipment Operator	1	50	N	L	1-4	550	2-2	125	3-2	125	4-2	75	5-3	150	<b>1075</b>	

Supervision Legend:  
N = None  
L = Lead  
D = Direct



CITY OF OAKLAND

## *MEMORANDUM*

**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of New Classification Specification for Fire Inspection Supervisor

Based upon a classification review at the request of the Oakland Fire Department, Human Resources Management has proposed the creation of a new classification specification for **Fire Inspection Supervisor**.

Several new Fire Prevention Bureau Inspector (Civilian) positions were added to the unit in recent years. Prior to the new positions being added in the budget, there were too few inspectors to deliver necessary services. Because of the additional positions, there are now too many direct reports along with a missing mid-manager level position to supervise the numerous positions. The solution is to add a new supervisory level between the inspectors and the Assistant Fire Marshal.

The proposed new Fire Inspection Supervisor classification, in representation unit UH1, will be responsible for the following:

Planning, organizing, directing, and reviewing work in a unit within the Fire Prevention Bureau in the areas of fire safety and prevention, vegetation management, and engineering services. The Fire Inspection Supervisor performs a wide range of technical and supervisory duties related to: interpreting and enforcing city codes, ordinances, and regulations; coordinating fire prevention and education programs and operations; assisting in the development of goals and objectives, priorities, and policies and procedures within an assigned unit; and overseeing and resolving difficult and sensitive inquiries or complaints.

Three placeholder positions were included as part of the FY 2019-2021 approved budget. The new job description will be used for the upcoming recruitment process.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed new classification specification in April 2019. Representatives then met monthly through September to discuss the potential impacts of the new classification. In an email dated September 27, 2019, the union confirmed that there are no objections to the creation of the proposed new classification specification.

The item was originally scheduled for the October 17, 2019 Civil Service Board meeting. Due to a lack of quorum, the item was rolled to the November 14, 2019 meeting but it was pulled from the agenda that evening. Additional changes were necessary regarding eligible certifications in

**CIVIL SERVICE BOARD**

Subject: Fire Inspection Supervisor Classification Specification

Date: December 19, 2019

Page 2

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order to align the subordinate classification with the supervisory classification. This results in more flexibility for applicants to choose which one is most suitable for them from a list of eligible certifications. Local 21 was notified of the additional proposed changes, and a meeting occurred on December 3, 2019 to discuss the potential impacts. In an email dated December 5, 2019, the union confirmed that there are no objections to the creation of the brand-new classification specification with the expanded list of eligible certifications.

The salary ordinance amendment to formally add the classification to the City's Salary Schedule has already been approved. Two readings occurred at City Council meetings on November 5 and November 19, 2019.

Additionally, the Port does not operate public safety programs. Therefore, classifications specifically designed in support of public safety programs have no corresponding classifications at the Port.

Staff recommends that the Civil Service Board approve the proposed new **Fire Inspection Supervisor** classification specification.

**Attachments:** Proposed new Fire Inspection Supervisor classification specification.



# FIRE INSPECTION SUPERVISOR

**DRAFT**  
to CSB  
2019-12-19

**Class Code: SC262**

**Civil Service Classified**

## **DEFINITION**

Under direction in the Oakland Fire Department, plans, organizes, directs and reviews work in a unit within the Fire Prevention Bureau in the areas of fire safety and prevention, vegetation management, and engineering services. The Fire Inspection Supervisor performs a wide range of technical and supervisory duties related to: interpreting and enforcing city codes, ordinances, and regulations; coordinating fire prevention and education programs and operations; assisting in the development of goals and objectives, priorities, and policies and procedures within an assigned unit; and overseeing and resolving difficult and sensitive inquiries or complaints; and performs other related duties as assigned.

## **DISTINGUISHING CHARACTERISTICS**

This is a first-level supervisory classification responsible for supervising a unit and performing the more difficult and complex assignments. The incumbent operates with considerable autonomy and is expected to perform duties and make decisions with a high degree of independence. This classification is distinguished from the higher-level Assistant Fire Marshal in that the latter has responsibility for directing the activities of a division in the Fire Prevention Bureau.

The incumbent receives direction from the Assistant Fire Marshal (sworn or non-sworn) and provides supervision to Fire Prevention Bureau Inspectors. The incumbent may provide direction to Fire Protection Engineers, and other professional, technical, and support staff as assigned. The Fire Inspection Supervisor is a non-sworn position that is not expected to participate in fire suppression activities.

## **EXAMPLES OF DUTIES** - *Duties may include, but are not limited to the following:*

Plan, schedule, and supervise the activities of a unit in the Fire Prevention Bureau.

Coordinate and/or conduct fire code inspections, including, but not limited to: new construction and tenant improvements/fire clearances, state-mandated inspections (schools, hospitals, high-rise buildings), annual operating permit inspections, vegetation management inspections, engine company referrals for unpermitted/dangerous building inspections, special events inspections, and initiating and monitoring fire watch for faulty/dysfunctional fire alarms; ensure conformity and compliance with applicable fire safety codes, statutes, rules and regulations.

Assign and track initial, annual and renewal fire safety inspections; determine priority of inspections; establish goals and deadlines for their completion; ensure any required re-inspections are conducted and verify that all recommended corrections have been made.

Investigate complaints and provide on-site assistance and consultation to Fire Inspectors with problematic and/or complex fire safety inspections.

Participate in the selection and training of staff; ensure requisite training and certification is maintained; conduct performance evaluations; work with employees to correct deficiencies; implement disciplinary procedures as needed.

Collect, analyze, and evaluate data related to operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

Review and evaluate inspection activities and correspondence regarding fire inspections.

Develop, coordinate and present public education and safety programs; prepare and supervise preparation of written materials.

May assist in coordinating fire related code review and approval of occupancy permits and business licenses with building officials.

Assist in developing and monitoring section budget; make recommendations.

Assist in writing and revising fire safety rules and regulations; develop and/or assist in the development of personnel and operational policies and procedures for the fire inspection unit.

May provide technical advice and consultation regarding fire safety to architects, engineers, and building owners.

May assist in supervising the investigation of major fires, fires of suspicious origin or those which involve loss of life; search fire scene for physical evidence.

May receive public records requests; ensure prompt, accurate and thorough responses.

Operate a vehicle in the performance of assigned duties.

## **KNOWLEDGE AND ABILITIES**

Knowledge of:

- Principles of supervision, performance evaluation, progressive discipline, motivation and organization.
- Principles and practices of fire prevention, inspection, code enforcement, plan review, and vegetation management.
- Report writing, budget development and record keeping.
- Practices and techniques of customer service, education, outreach, and public relations.
- Computer systems, applications, mobile devices, and emergency communications.
- Safety procedures and techniques.

Ability to:

- Coordinate the work of technical and clerical staff.
- Analyze, interpret, and explain applicable codes, ordinances and regulations related to fire prevention education and enforcement.
- Read and interpret maps, building plans, and blueprints.
- Prepare and analyze reports, correspondence and other written materials.
- Safely operate automotive vehicles in the performance of the assigned duties.
- Interpret and enforce operational policies, practices, and procedures.
- Work an irregular schedule including early mornings, evenings, and weekends.
- Communicate effectively in both oral and in written forms.

- Prepare and conduct presentations to diverse audiences.
- Determine and establish priorities, set standards, and provide guidelines.
- Provide staff training and conduct performance appraisals.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

## **MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

### **Education:**

An Associate's degree in fire science, fire technology, public or business administration or closely related. Successful completion of Fire Inspector 1A, 1B, 1C, and 1D courses (effective August 1, 2013) is highly desirable.

### **Experience:**

Four (4) years of progressively responsible professional experience in fire prevention, suppression, inspection, code enforcement, investigation, fire education or training. One year of lead or supervisory experience is highly desirable.

## **LICENSE AND CERTIFICATE**

Possession of a valid California Class "C" or higher driver's license issued by the Department of Motor Vehicle (DMV). Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment.

Must possess a valid Fire Inspector I Certification (or higher) through one of the following:

International Code Council (ICC)

OR

California Office of the State Fire Marshal (OSFM)

OR

National Fire Protection Association (NFPA)

OR

equivalent as defined by the California Office of the State Fire Marshal  
and maintain possession by renewing the certification on or before the expiration date.

## **OTHER REQUIREMENTS**

Must be eighteen (18) years of age or older by the application closing date.

Must pass a thorough background investigation that complies with the background clearance of California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI).

May be required to pass an employment physical examination.

Must be a U.S. citizen or legally authorized to work in the United States.

Must have an acceptable driving record.

<b>DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY</b>			
Established:	/ /	CSB Resolution #:	Salary Ordinance #:
Exempted:	Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	
Revision Date:	/ /	CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s):			



# MEMORANDUM

**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of New Classification Specification for Chief of Fire, Assistant

Based upon a classification review at the request of the Oakland Fire Department (OFD), Human Resources Management has proposed the creation of a classification specification for the **Chief of Fire, Assistant** classification. This classification has existed for decades but no approved classification specification is on record and no working draft exists.

The classification has been used in the past but not in recent years. OFD just added two positions to the budget. This description will be used for the recruitment and selection process in the near future.

The proposed duties as listed on the draft Chief of Fire, Assistant classification specification are as follows:

The Chief of Fire, Assistant manages, plans, organizes, and directs, through subordinate supervisors, day to day operations of the Fire Department. Incumbents are responsible for oversight of several battalions/districts (divisions) and/or specialty divisions that may include Training, Support Services, Special Operations, and FEMA Urban Search and Rescue, along with shift oversight (Duty Chief).

While the International Association of Fire Fighters (IAFF, Local 55) was provided with a courtesy notice regarding the proposed classification specification, the classification is not represented by any bargaining group and is exempt from civil service. There was an email exchange between Local 55 and the City on November 15, 2019 to address a specific inquiry but no further questions or concerns were communicated. Local 55 did not request to meet.

The Port of Oakland does not operate any sworn, fire services programs. Therefore, classifications specifically designed to support such a program have no corresponding classifications at the Port.

Staff recommends that the Civil Service Board approve the proposed new **Chief of Fire, Assistant** classification specification.

**Attachments:** Proposed New Chief of Fire, Assistant classification specification.



# CHIEF OF FIRE, ASSISTANT

**DRAFT**

**Class Code: EM113 FTE**

**Exempt**

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## DEFINITION

Under administrative direction in the Oakland Fire Department, manages, plans, organizes, and directs, through subordinate supervisors, day to day operations of the Fire Department; is responsible for oversight of several battalions/districts (divisions) and/or specialty divisions that may include Training, Support Services, Special Operations, and FEMA Urban Search and Rescue, along with shift oversight (Duty Chief); and performs related duties as assigned.

## DISTINGUISHING CHARACTERISTICS

This is an executive-level sworn, public safety officer classification and is a member of the executive management team. Pursuant to the Oakland Charter 902(f), this position is exempted from the regulations of the Civil Service Board. This classification is distinguished from the higher-level Deputy Chief of Fire in that the incumbent of the latter functions as second in command to the Chief. It is further distinguished from the lower-level Battalion Chief in that the latter manages a district consisting of engine and truck companies supervised by Captains or Lieutenants.

The incumbent receives administrative direction from the Deputy Chief of Fire and exercises direction over Battalion Chiefs, subordinate supervisors, and sworn and non-sworn administrative personnel.

## EXAMPLES OF DUTIES - *Duties may include, but are not limited to the following:*

Train and develop subordinates; serve as mentor to subordinate staff to promote professional development.

Evaluate and document the performance of Battalion Chiefs, officers or other assigned staff to improve work and compliance with Department regulations, standard operating guidelines, and policies and procedures. Provide feedback to subordinates directly or through written reports.

Counsel subordinates on performance and areas for improvement.

Develop strategies, tactics, and plans for pre-emergency and emergency situations and all risk mitigation of related incidents to ensure safe and effective responses.

Implement emergency plans and post-emergency evaluation.

Perform emergency and non-emergency tasks. Emergency tasks include those associated with responding to incidents as the Duty Chief. At emergency incidents, and in the absence of a senior officer, an Assistant Chief may direct and ensure the efficiency of multi-unit operations, fire ground operations, and Emergency Operations Center assistance.

Assume liaison duties for working with other agencies, including requests for mutual aid in response to emergency situations.

Communicate with other agencies at fire scenes or other emergency incidents to secure necessary resources and provide updates about incidents internally and externally and coordinate responses.

Respond to media inquiries and issue statements to the media.

Respond to citizen complaints or inquiries by phone, in writing and/or in person.

Oversee special projects and programs to improve the Department's operations.

Monitor project progress and develop summary reports.

Plan, delegate, and oversee execution of division programs and activities.

Research and develop special programs, policies, and procedures.

Interpret Department rules and regulations and Memorandum of Understanding (MOU) provisions.

Enforce legal mandates, Department policies, and work rules to improve employee performance and compliance with Department regulations.

Monitor and enforce compliance of Department's programs, recordkeeping, reports, and required data entry.

Investigate alleged violations of policies and procedures and/or Rules and Regulations. Implement and recommend disciplinary actions to improve personnel performance and behaviors.

Participate in the grievance process to resolve personnel issues at the lowest possible level; conduct Skelly hearings.

Prepare or review reports for the Mayor, City Council, City Administration, boards, commissions, and other internal and external organizations.

Make oral presentations at City, board, and community meetings.

Assist with the preparation and administration of a budget for one or more division(s).

Monitor human resources activities for one or more division(s) including recruitment, hiring, training, employee relations, and other areas as necessary.

Ensure citywide emergency response coverage is maintained to meet established standards.

Oversee scheduling for shift and incident operational periods.

Plan, organize, coordinate, administer, and direct the work of a division(s) of the Oakland Fire Department.

Direct staff who are responsible for Department-wide inspection programs, pre-fire planning, equipment services, facilities maintenance, in-service training, and community relations.

Identify training needs and evaluate existing training programs; develop, conduct, and observe drills and training programs in collaboration with assigned Training Division staff.

Preserve a high state of morale by maintaining a presence of authority and direction.

Drive Department vehicles in accordance with Vehicle Code and Department regulations.

Serve as Acting Chief or Deputy Chief as needed to maintain continuity of Department operations.

**KNOWLEDGE AND ABILITIES**

## Knowledge of:

- Modern principles, techniques, strategy, materials, and equipment used in a metropolitan fire department in fire suppression, investigation, and prevention.
- Current strategies, tactics, methods, techniques, and equipment used for effective fire service management.
- Principles of goal setting and leadership.
- Principles and practices of techniques and equipment used in emergency response.
- Department mission statement, philosophy, short and long-term objectives, resources, policies, rules, regulations, radio transmission/use procedures, and professional standards.
- Oakland topography, City infrastructure, and jurisdictional boundaries.
- Internal resources in addition to external resources provided through the mutual aid system that could be utilized in emergency response.
- Fire Science and the Incident Command System (ICS).
- Principles of hydraulics and chemistry as applied to fire fighting and fire suppression.
- Modern principles of supervision, training, and leadership.
- Modern administrative, project management, and budgetary principles and techniques.
- Community Risk Reduction best practices and methods.
- City Purchasing Guidelines and Contract Compliance.
- Memoranda of Understanding (MOU) provisions (sworn and civilian).
- Computer systems, software applications, and mobile devices.

## Ability to:

- Problem solve, direct operations, and communicate effectively under conditions of high activity or stress.
- Arrive at an incident within the City sixty (60) minutes when fulfilling Deputy Chief responsibilities.
- Establish a presence of authority.
- Perform and direct operations dealing with emergency incidents, using appropriate resources to achieve tactical and strategic objectives.
- Effectively apply the Incident Command System (ICS) during emergencies.
- Use vehicle radio or cellular telephone to verbally communicate with Fire Dispatch Center, stations and mutual aid agencies.
- Drive vehicle safely during emergency response and routine driving.
- Apply Department procedures and established fire service techniques appropriately to a variety of fire service situations, including personnel matters, program administration, and emergencies.
- Analyze problems, exercise independent judgment within general policy guidelines, and adopt an effective course of action under stressful conditions; make command decisions.
- Apply judgment and knowledge of the Department's philosophy, short and long-term objectives, resources, policies, procedures, and professional standards to plan and organize activities.
- Set clear goals, provide a sense of direction and facilitate organizational change.
- Establish procedures to monitor and control the activities of subordinates to ensure effective performance.
- Coordinate multiple tasks and schedule them in an efficient manner.

- Complete assignments thoroughly, including follow-up to projects.
- Determine and establish priorities for assigned area(s) of responsibility.
- Organize, direct, and coordinate a team of employees through subordinate supervisors.
- Employ knowledge and interpersonal communication skills to quickly obtain essential information from other Officers.
- Supervise, train, motivate, and evaluate personnel.
- Listen to others attentively and with comprehension.
- Build a team culture that prioritizes cooperative, productive, and professional working relationships through staff development and staff wellness; maintain a positive working environment to enhance staff morale and productivity.
- Develop and make oral and visual presentations to various groups, organizations, and committees, including City leadership and community members.
- Communicate effectively in both oral and written form.
- Prepare clear, concise, well-organized, and grammatically correct written statements, including letters, memos, reports, and training materials.
- Communicate the importance for building a strong bond between the Fire Department, the community, and other agencies/departments in the City.
- Commit to public service and good community relations.
- Be open to mentoring, constructive criticism, and guidance.
- Manage time effectively.
- Demonstrate personal integrity and a strong moral character.
- Be articulate, informative, and tactful when addressing diverse individuals or groups.
- Demonstrate composure, emotional intelligence, and patience during difficult circumstances.
- Utilize computer systems, software applications, and mobile devices.
- Establish effective working relationships with those contacted in the performance of duties

## MINIMUM QUALIFICATIONS

*The following qualifications are guidelines, as the appointing authority has broad discretion in filling positions in this classification.*

### **Education:**

High school diploma or equivalent. A Bachelor's degree is desired, and evidence of advanced education and continued professional training and development is highly desirable.

### **Experience:**

**Internal Candidates:** At least one (1) year of experience as a Battalion Chief or five (5) years of experience as a Captain of Fire in the Oakland Fire Department. A combination of experience as an Oakland Battalion Chief and as an Oakland Fire Captain totaling five years will also meet the minimum requirements.

**External Candidates:** At least three (3) years of progressively responsible leadership and management experience in a full-time capacity as a Chief Officer (Battalion Chief or higher) with a municipal, county or state fire department. Experience serving an urban, ethnically diverse, and socio-economically diverse community is required.

**LICENSE OR CERTIFICATE**

Incumbent in this position is expected to operate automotive vehicles in the performance of assigned duties. Individual(s) appointed will be required to maintain a valid California Class "C" or higher Driver's License throughout the tenure of employment. Within one year, must obtain and maintain Firefighter driver certification through the Oakland Fire Department, including medical clearance, and any other California Department of Motor Vehicles (DMV) and/or Department required endorsements.

Possession of a current Emergency Medical Technician or Paramedic license/certification that meets standards of the California Emergency Medical Services Authority and ability to obtain and maintain accreditation in the Alameda County Emergency Medical Services Agency District throughout the tenure of employment.

Possession of a current Alameda County Emergency Medical Services Agency approved certification for Cardio-Pulmonary Resuscitation (CPR) throughout the tenure of employment.

Possession of a California State Fire Marshall Chief Officer Certification is highly desirable.

**OTHER REQUIREMENTS**

Must be eighteen (18) years of age or older by the application closing date.

Must pass a thorough background investigation.

**DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established:	/ /	CSB Resolution #:	Salary Ordinance #:
Exempted:	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #: 902(f)	
Revision Date:	/ /	CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s):	)		



CITY OF OAKLAND

## MEMORANDUM

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**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board      **FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of New Classification Specification for Capital Improvement Project  
Coordinator, Assistant

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Based upon a classification review at the request of the Oakland Public Works (OPW) Department, Human Resources Management has proposed the creation of a classification specification for the **Capital Improvement Project (CIP) Coordinator, Assistant** classification. The classification was created in November 2015 via a salary ordinance amendment to City Council but a classification specification has never been established.

The classification was originally developed as part of a classification review but the incumbent who was in another department resigned before the classification specification was finalized. Due to some recent concerns, OPW reconsidered use of this classification. Once OPW had confirmed their intent to use this classification moving forward, the working draft from 2015 was finalized for submission to the union. It is now necessary to adopt an official classification specification.

OPW is specifically concerned about the lack of a promotional ladder for junior level CIP Coordinators to enter the field. Additionally, the City's service delivery needs related to CIP projects are growing at a rapid rate. OPW determined that the best way to grow their capacity to handle CIP projects is to add this position to their budget. Aside from providing career growth opportunities, this classification may enhance employee retention as well.

The proposed duties as listed on the draft CIP Coordinator, Assistant classification specification are as follows:

Assists in the coordination and management of the planning, community meetings, design, and construction processes for the City's Capital Improvement Program (CIP) projects; assists in managing all phases of a CIP project including budget, scheduling, controls and client satisfaction; and researches and identifies potential funding sources for projects.

OPW intends to add one to two positions in the upcoming months. This description will be used for the future recruitment process.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification. City staff and union representatives met monthly in August, September, and October to discuss the changes. In an email dated November 14, 2019, the union confirmed that they have no objections to the proposed classification specification.

**CIVIL SERVICE BOARD**

Subject: Capital Improvement Project Coordinator, Assistant Classification Specification

Date: December 19, 2019

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Additionally, no determination has been rendered regarding the “common class” status of this classification. The "Common Class" Project is currently underway, and more information will be available in the future.

Staff recommends that the Civil Service Board approve the proposed new **Capital Improvement Project Coordinator, Assistant** classification specification.

**Attachments:** Proposed New Capital Improvement Project Coordinator, Assistant classification specification.



# CAPITAL IMPROVEMENT PROJECT COORDINATOR, ASSISTANT

**DRAFT**  
to CSB  
2019-12-19

**Class Code: AP448 FTE**

**Civil Service Classified**

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## DEFINITION

Under general direction in the Oakland Public Works Department, assists in the coordination and management of the planning, community meetings, design, and construction processes for the City's Capital Improvement Program (CIP) projects; assists in managing all phases of a CIP project including budget, scheduling, controls and client satisfaction; researches and identifies potential funding sources for projects; performs other related duties as required.

## DISTINGUISHING CHARACTERISTICS

This is a journey-level classification that is responsible for supporting projects that are part of the City's Capital Improvement Program, including renovation and capital improvements to City-owned buildings, facilities, fields, parks and other capital infrastructure. This classification is also responsible for supporting and assisting with integrating all phases of the work from the initial planning stages to the completion of construction. This classification is distinguished from the Capital Improvement Project Coordinator classification in that the latter works with a high level of independence and autonomy required in the project leadership position and is responsible for larger projects that are more complex in scope, such as facility and/or complete park/site renovation projects.

The incumbent receives direction from management staff in the Project Delivery Division and may provide lead direction to professional, technical and clerical support staff in the implementation of capital projects or programs.

## EXAMPLES OF DUTIES - *Duties may include, but are not limited to, the following:*

For routine projects that are smaller/less complex in scope, funding sources, stakeholder groups, and/or coordination and in assistance to supervisors on more complex projects: define project goals and objectives; establish accompanying schedules and finalizing cost estimates; assist with monitoring and tracking project progress and expenditures.

Serve as primary point-of-contact for assigned projects for all communications for client City departments, contractors, consultants, vendors, community groups and other stakeholders.

Prepare, evaluate, and recommend professional consultant services: assist with or prepare Requests for Proposals/Qualifications and Notice of Inviting Bid packages; negotiate, prepare, and administer professional services and construction contracts for assigned projects.

Track and monitor all project activities; assist with preparing budget reports and cost control analysis; submit quarterly, semi-annual, and or annual reports as required by funding agency.

Coordinate and participate in public relations efforts; may make presentations to City staff, City Council, boards and commissions, neighborhood groups, other stakeholders, and the general

public.

Coordinate review and distribution of technical reports, designs, and contract documents in accordance with project schedule; review submittals, payment requests, and changes to the plan including schedule, budget or construction changes

Plan, coordinate, and direct functional City staff, contractors, partners, funders, and vendors to meet defined goals and objectives on schedule, within budget, and to the client's and stakeholders' satisfaction.

Establish communications protocol, make presentations, and provide guidance to consultant on project criteria, regulations, codes, standards, and schedules.

Prepare a variety of computer-generated reports of a general or technical nature regarding projects for the City Council, client department, and/or Director of Public Works.

Maintain organized project records including contracts, specifications, reports, studies, and correspondence.

Assist in funding development for projects, such as research funding opportunities, identify and write minor potential fund sources/grant proposals.

Perform project start-up processes such as preparing client agreements, creating the preliminary budget, establishing the project team, preparing RFP's, and contracting to implement assigned projects.

Prepare and track ongoing project processes such as updating project management software, updating information for project webpages, setting up meetings, and summarizing meeting notes.

Assist the unit with organization and archiving of project delivery resources and libraries.

Drive an automotive vehicle to various sites to oversee the project, meet with project staff or attend meetings.

## **KNOWLEDGE AND ABILITIES**

Knowledge of:

- Principles and practices of project management.
- Basic understanding of public funding sources and legal requirements for public projects.
- Project cost estimating and cost/benefit analysis.
- Local, state and federal laws, codes, and regulations relating to construction and building projects.
- English punctuation, syntax, language mechanics and spelling.
- Negotiation and conflict resolution techniques.
- Principles of contract and budget administration.
- Personal computer systems and applications, including project management software.
- Public speaking and presentation techniques.
- Effective meeting facilitation and inter-personal skills.

Ability to:

- Prepare general schedule and budget for small, minor or less complex capital improvement projects; analyze and monitor costs.
- Oversee and implement assigned projects to meet project scope, budget, and schedule.

- Assist senior staff/supervisors on larger, major capital projects as needed.
- Coordinate functions and activities between the department and outside agencies.
- Assist in preparation of clear, comprehensive reports and assist in preparation of City Council reports.
- Identify and solve problems on a timely basis; engage clients in the problem-solving process.
- Communicate clearly and concisely in oral and written form
- Assist in the preparation, management, and administration of project-related contracts.
- Utilize computers and software applications including word processing, spreadsheets, databases, text/image editing, project management, and graphics software.
- Maintain organized files and records;
- Provide lead direction to assigned staff.
- Work collaboratively with and follow direction from lead staff and other project stakeholders.
- Assist with preparing and submitting grant proposals.
- Monitor and evaluate assigned project activities and timeline
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

### **MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable:*

#### **Education:**

A Bachelor's degree from an accredited college or university in public administration, civil engineering, urban planning, architecture or a related field.

#### **Experience:**

Two (2) years of progressively responsible experience in project management, construction management, design, architecture or related field.

### **LICENSE OR CERTIFICATE**

Successful incumbents in this job are expected to operate automotive vehicles in the performance of the assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties

Possession of a related professional license or program certification is desirable.

### **OTHER REQUIREMENTS**

None required.

**DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY**

Established:     /   /           CSB Resolution #:                   Salary Ordinance #:  
Exempted:    Y  N     Exemption Resolution #:

Revision Date:     /   /           CSB Resolution #:  
Re-titled Date:    /   /           CSB Resolution #:                   Salary Ordinance #:

(Previous title(s):        )



CITY OF OAKLAND

## MEMORANDUM

**DATE:** December 19, 2019

**TO:** The Honorable Civil Service Board

**FROM:** Jaime Pritchett  
Principal Human Resource Analyst

**THROUGH:** Greg Preece, Human Resources Manager, Recruitment & Classification

**THROUGH:** Ian Appleyard, Director of Human Resources Management  
Secretary to the Board

**SUBJECT:** Approval of New Classification Specification for Ethics Analyst III

Based upon a classification review at the request of the Public Ethics Commission (PEC), Human Resources Management has proposed the creation of a new classification specification for **Ethics Analyst III**.

The PEC is interested in creating a promotional ladder for the existing Ethics Analyst I and II staff. The primary roles will involve coordinating projects and partnerships, overseeing the customer service counter, drafting and recommending policies, and supervising staff.

A summary of the duties expected to be performed by the new classification is provided below:

The Ethics Analyst III leads the planning, implementation, and staffing of the Commission's education, engagement, and disclosure programs; oversees the operations of the Commission's public-facing office; conducts research and analyzes legislation; drafts policies and recommends policy changes; leads technology projects and partnerships; and trains, evaluates, and supervises staff.

No position has been allocated in the budget yet but discussions about future funding have begun. With City Council approval, it could be added as early as July 2020 as part of mid-cycle budget adjustments. The new job description will be used for the future recruitment process once a vacant position is established.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed new classification specification. Representatives met on October 17<sup>th</sup> and December 3<sup>rd</sup>. The union confirmed in an email dated December 5, 2019 that they have no objections to the creation of the proposed new classification specification.

The salary ordinance amendment to formally add the classification to the City's Salary Schedule is being drafted. The item is tentatively scheduled for February/March 2020 City Council meetings.

Additionally, the "common class" status of this classification has not been determined. The "Common Class" Project is currently underway, and more information regarding this classification will be available at a later date.

Staff recommends that the Civil Service Board approve the proposed new **Ethics Analyst III** classification specification.

**Attachments:** Proposed new Ethics Analyst III classification specification.



**DRAFT**

## **ETHICS ANALYST III**

**Class Code: APXXX FTE**

**Civil Service Classified**

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### **DEFINITION**

Under direction in the Public Ethics Commission (PEC), leads the planning, implementation, and staffing of the Commission's education, engagement, and disclosure programs; oversees the operations of the Commission's public-facing office; conducts research and analyzes legislation; drafts policies and recommends policy changes; leads technology projects and partnerships; trains, evaluates, and supervises staff; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS**

This is a supervisory level classification in the Ethics Analyst series. This classification is distinguished from the lower level Ethics Analyst II in that the incumbent in that the incumbent of the former supervises professional staff or clerical staff.

The incumbent receives general supervision from the PEC's Executive Director and supervises assigned professional or clerical staff.

### **EXAMPLES OF DUTIES** - *Duties may include, but are not limited to the following:*

Plan, organize, and prioritize education, engagement, and disclosure activities, including the day-to-day operations of the public access office of the PEC.

Research, analyze, and make policy recommendations; assist in the development and implementation of goals, objectives, and work standards.

Provide data or analytic assistance to enhance the collection, analysis, and understanding of PEC information, programs, or overall performance.

Identify, initiate, and lead projects with partner organizations, agencies, and vendors to leverage opportunities for engagement and innovation to further the Commission's work.

Supervise, train, evaluate, and develop assigned staff.

Perform and oversee the work of other staff in the development of educational tools and the delivery of services to members of the regulated community in complying with campaign finance, ethics, and transparency reporting requirements.

Draft and direct the preparation and dissemination of communications, reports, studies, and educational materials regarding campaign finance, governmental ethics, and transparency laws, policy, and related programs.

Remain abreast of innovations in government technology and civic engagement in order to incorporate best practices into PEC work.

Foster collaborative relationships with individuals, vendors, public and private agencies, and

others contacted in the performance of assigned duties.

## **KNOWLEDGE AND ABILITIES**

Knowledge of:

- Principles and practices of public administration.
- Principles and practices of program management and administration.
- Research and data analysis methods and techniques.
- Social media and online engagement platforms.
- Principles and practices of supervision and training.
- Computer applications, including word processing, spreadsheets, databases, and web content management systems.
- Campaign finance, ethics, and/or government transparency laws.

Ability to:

- Plan, administer, and evaluate policies and programs.
- Create communication materials, presentations, and reports.
- Communicate effectively in writing and orally with the public, including City departments and State agencies; make presentations to a variety of audiences.
- Interpret state and local laws and regulations pertaining to ethics, campaign finance, transparency or related laws.
- Translate complex legal concepts into plain language.
- Use web-based content management system and other computer programs to publish and disseminate information.
- Analyze information and data sets; prepare clear, concise summaries and reports; maintain records.
- Supervise, train, evaluate, and develop assigned staff.
- Collaborate with team members to meet tight deadlines and accomplish Commission goals.
- Establish and maintain effective working relationships with those contacted in the performance of required duties

## **MINIMUM QUALIFICATIONS**

*Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.*

### **Education:**

A Bachelor's degree from an accredited college or university in business or public administration, public policy, sociology, education, economics, political science, communications, journalism, business, finance, accounting, computer science, or a related field. A Master's degree in a related field is highly desirable.

### **Experience:**

Four (4) years of progressively responsible professional work experience in developing and implementing education, engagement, communications, or online information or

disclosure programs and related materials, including one year of lead or supervisory experience. Experience with campaign finance, lobbyist, transparency or ethics laws and regulations is highly desirable.

**LICENSE OR CERTIFICATE**

Successful incumbents in this position are expected to operate automotive vehicles in the performance of assigned duties. Due to the nature of the assignment and the hours worked, public transportation may not be a cost effective or efficient method for traveling to the various locations required. Individuals who are appointed to this position will be required to maintain a valid California Driver's License throughout the tenure of employment OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.

**OTHER REQUIREMENTS**

None required.

<b>DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY</b>			
Established:	/ /	CSB Resolution #:	Salary Ordinance #:
Exempted:	Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	
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