



CIVIL SERVICE BOARD MEETING AGENDA

Date: March 19, 2020

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; 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
Jessica Rutland, HR Technician/Staff to the Board
Vadim Sidelnikov, Deputy City Attorney

OPEN SESSION AGENDA

ROLL CALL

1) OPEN FORUM

2) **APPROVAL OF THE MARCH 19, 2020 CIVIL SERVICE BOARD MEETING AGENDA** ACTION

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

4) **CONSENT CALENDAR:** ACTION

a) Approval of Provisional Appointment

- There are no Provisional Appointments.

b) Approval of Employee Requests for Leave of Absence

- Oakland Public Library Department (1)
- Oakland Fire Department (1)

c) Approval of Revised Classification Specifications

- Manager, Capital Improvement Program
- Spatial Data Administrator

5) OLD BUSINESS:

- a) Approval of February 20, 2020 Civil Service Board Meeting Minutes ACTION
- b) Approval of December 19, 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

There is no report available for this month.
- e) Update on Common Class Study - Draft Koff & Associates Report Regarding Information Technology Occupational Grouping and Business and Industry Occupational Grouping INFORMATION

6) NEW BUSINESS:

- a) There are no new business items for this month.

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, April 16, 2020. All materials related to agenda items must be submitted by Thursday, April 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, 2nd floor
Oakland, CA 94612
civilservice@oaklandca.gov



Do you need an ASL, Cantonese, Mandarin or Spanish interpreter or other assistance to participate? Please email 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 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

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



MEMORANDUM

DATE: March 19, 2020

TO: The Honorable Civil Service Board

FROM: Greg Preece, HRM Manager / Staff to the Board

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

SUBJECT: Request Authorization for Employee Requests for Leave of Absence

HRM is in receipt of two (2) Unpaid Leave of Absence requests pursuant to Personnel Manual Section 8.07 Miscellaneous Leaves of Absence.

Employee Name	Classification	Department	Leave Duration	Category
Hajny, Megan	Engineer of Fire	Fire Department	March 18, 2020 – March 17, 2021	CRS 8.07 (c)
Moran, Patricia	Librarian I	Library Department	March 16, 2020 – March 23, 2020	CRS 8.07 (c)

RECOMMENDATION:

Staff recommends that the Civil Service Board approve the requested Leaves 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 Megan Hajny Employee's ID 21653 Today's Date 2/11/2020

Department/Division Fire Employee Job Title Engineer of Fire

Request: 365 Days Hours From 3/18/20 To 3/17/21

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(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.

[Signature] 2/17/2020
Employee's Signature Date

Civil Service Board Approval Date

[Signature] 2/27/20
Department Head Approval 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.

RECEIVED DEPT OF HUMAN RESOURCES MANAGEMENT 20 MAR - 2 AM 11:16
RECEIVED CIVIL SERVICE BOARD 20 FEB 24 AM 9:19



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 Patricia Moran Employee's ID 25630 Today's Date 3/4/20

Department/Division Library Employee Job Title Librarian I

Request: 6 Days Hours From 3/16 To 3/23
No. of Days or Hours Select Days or Hours

Unpaid Leave Taken This Year? Yes No If yes, what type of leave _____
(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
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* 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.

Patricia Moran 3/4/20
 Employee's Signature Date

 Civil Service Board Approval Date

[Signature] 3/6/2020
 Department Head Approval 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

DATE: March 19, 2020

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 Manager, Capital Improvement Program

Based upon a classification review at the request of the Oakland Public Works (OPW) Department, staff has proposed revisions to the **Manager, Capital Improvement Program (CIP)** classification specification. The classification specification was established in February 2011 and revised in August 2018.

Only minimal edits were proposed because the revisions in 2018 were quite comprehensive. They are as follows:

- In the Distinguishing Characteristics section, the reporting structure is being further refined.
- In the Examples of Duties section, one task statement is being amended and another statement involving long-range planning is being added back.
- In the Education section, the broad “business development” major is being added as a qualifying field of study.
- In the License and Certification section, an additional licensing body is being added as acceptable since the license can be issued by the State of California or National Council of Architecture Registration Board.

The position is not currently allocated in OPW’s budget. Once the revisions and salary adjustment are processed, OPW will add a new position. The revised classification specification will be used to initiate an exempt recruitment and selection process later this year.

It is also necessary to modify the salary range of the classification. The department intends to have Project Manager II positions newly report to the Manager, Capital Improvement Program as part of its efforts to re-envision capital improvement projects into a more comprehensive and integrated CIP program. However, the Project Manager II classification is also at the same pay grade and pay rate as Manager, Capital Improvement Program. That posed a problem in the City’s pay structure and required a proposal to adjust the salary rate for the Manager, Capital Improvement Program to reduce the possibility of compaction in the reporting structure. Therefore, the City proposed adjusting the Manager, Capital Improvement Program salary range to match the similarly situated Principal Civil Engineer classification. OPW has already received budget approval to advance this proposal, which requires City Council approval of a salary ordinance amendment following union discussions.

CIVIL SERVICE BOARD

Subject: Manager, Capital Improvement Program Classification Specification

Date: March 19, 2020

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The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions and salary change proposal in December 2019. City staff and union representatives discussed the potential impacts at meetings in December 2019 and February 2020. In an email dated March 3, 2020, the union confirmed that there are no objections to the proposed revisions and salary adjustment.

The salary ordinance amendment to adjust the salary rate in the City's Salary Schedule will be scheduled for the Finance and Management Committee in April or May. Two readings by City Council will follow.

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 **Manager, Capital Improvement Program** classification specification.

Attachments: Revised draft Manager, Capital Improvement Program classification specification.



DRAFT

MANAGER, CAPITAL IMPROVEMENT PROGRAM

Class Code: MA107 FTE

Exempt

DEFINITION

Under general direction in the Oakland Department of Transportation or Oakland Public Works Department, uses operational decision making in the direction and coordination of work in the assigned Division; plans, organizes, manages, and directs the review and implementation of the City's major capital improvement projects and programs; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This is a division head classification with responsibility for the overall administration of an assigned division. Pursuant to the Oakland Charter 902(f) and Oakland Municipal Code, this position is exempt from the regulations of the Civil Service Board. The duties performed involve the exercise of considerable discretion and latitude of judgment in the formulation and development of policies and procedures. This classification is distinguished from the department Director, which is responsible for overseeing an entire department.

The incumbent receives administrative direction from the Director or, Assistant Director ~~other management staff~~ and exercises direction over professional, technical, and clerical staff in the division.

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

Plan, organize, manage, participate in, and direct the work of the division's portfolio of programs in close coordination with other departments and agencies, including capital improvements program, and project planning.

Prepare long-range plans in coordination with City departments, other divisions in the Oakland Department of Transportation and Oakland Public Works Department, and other public agencies.

Develop policies and procedures for establishing costs, schedule controls, and coordinating activities.

Negotiate and administer contracts with project participants and service providers.

Resolve conflicts in a timely manner satisfying the client's needs and the designer's concepts in keeping with the budgetary constraints and established schedule.

Prepare or review staff reports and resolutions for the City Administrator, City Council or commissions.

Work closely with the Council, public and private groups, professional groups, and citizens to explain or coordinate plans for proposed projects and to solicit their support.

Direct the preparation and administration of division, program, and project budgets.

Manage, assign, supervise, and evaluate assigned staff; provide training and staff development.

KNOWLEDGE AND ABILITIES

Knowledge of:

- Engineering, architecture, landscape architecture or planning principles and practices.
- Principles and practices of program and project management.
- Principles and practices of management and supervision.
- English punctuation, syntax, language mechanics, and spelling.
- Negotiation and conflict resolution techniques.
- Principles of budget development and monitoring including program and project budget development and schedule controls.
- Computer systems and applications.
- Principles and techniques for clear presentation of ideas and concepts in both oral and written formats.

Ability to:

- Select, train, and evaluate assigned staff.
- Negotiate and manage contracts.
- Coordinate functions and activities between the department and outside agencies.
- Prepare and administer a division budget.
- Prepare and present complex and comprehensive reports in both oral and written formats.
- Communicate effectively orally and in writing.
- Utilize computer systems and software applications.
- Establish professional working relationships with staff, elected, and appointed officials, representatives of other organizations, and the general public.

MINIMUM QUALIFICATIONS

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

Education:

A Bachelor's degree from an accredited college or university in engineering, architecture, landscape architecture, planning, design management, business administration and management, [business development](#) or a related field. A Master's degree is desirable.

Experience:

Three (3) years of progressively responsible experience in engineering, project and program management, architecture, landscape architecture, planning or other qualifying field

including two years (2) in a supervisory capacity.

LICENSE OR CERTIFICATE

Possession of one of the following is desirable: (1) a Certificate of Registration as a professional Civil Engineer in the State of California, (2) Certification as a Professional Planner with the American Institute of Certified Planners, (3) an Architecture license in the State of California or with the National Council of Architectural Registration Board or (4) a Landscape Architect’s License in the State of California.

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.

<u>DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY</u>				
Established:	2/10/2011	CSB Resolution #:	44360	Salary Ordinance #:
Exempted:	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	83024C .M.S	9.02(f) 10/19/2010
Revision Date:	7/19/2018	CSB Resolution #:	44904	
Re-titled Date:	n/a	CSB Resolution #:		Salary Ordinance #:
(Previous title(s): n/a)				



CITY OF OAKLAND

MEMORANDUM

DATE: March 19, 2020

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 Spatial Data Administrator

Based upon a classification review at the request of the Information Technology Department (ITD), staff has proposed revisions to the **Spatial Data Administrator** classification specification. The classification specification was established in July 1993 and has not been revised since that time.

The classification specification is being overhauled to update and modernize the description since technology has improved greatly in the last few decades. Most of the sections are being revised significantly, however, the minimum qualifications remain acceptable. Other changes are necessary for compliance with the classification specification template.

There is one vacant position. The approved classification specification will be used to initiate a recruitment and selection processes in the near future. Filling this position is a priority for the City Administration.

The International Federation of Professional and Technical Engineers (IFPTE, Local 21) was notified of the proposed classification specification revisions. City and union representatives discussed the potential impacts of the proposed revisions at monthly meetings in January and February. The concerns of union members were communicated via email in early March, and the City agreed to accept their proposed additions using slightly modified language. In an email dated March 11, 2020, the union confirmed that the union members are agreeable to the revisions and there are no lingering objections to the proposed changes.

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 **Spatial Data Administrator** classification specification.

Attachments: Revised draft Spatial Data Administrator classification specification.



DRAFT

SPATIAL DATA ADMINISTRATOR

Class Code: AP325 FTE

Civil Service Classified

DEFINITION

Under general direction in the Information Technology Department, administers the Geographic Information Systems (GIS) of the City, delivers GIS databases and map products in support of City programs and departments; maintains GIS hardware and software and performs planning analyses; ~~To~~ identifies and coordinates all procedures, standards, and methods for sharing enterprise spatial data resources (GIS data) by all departments in the City of Oakland; ~~to~~ organizes all spatial information resources into a consistent system that supports the City's needs; ~~and to~~ facilitates the development and implementation of a strategic plan to deploy spatial data architectures, and spatial design and development methodologies in support of the deployment of spatial information systems; ~~may train, supervise, and evaluate assigned staff; and performs related duties as assigned.~~

DISTINGUISHING CHARACTERISTICS

This is a first-level supervisory classification. Incumbents determine ~~graphic GIS~~ needs of City departments and supervise professionals, who design and maintain ~~graphic GIS~~ databases, ~~and data elements, and services~~. This classification ~~differs~~ is distinguished from the higher-level Information Systems Manager II in that the latter manages a division of a department. It is further distinguished from the lower-level Spatial Data Analyst III in that the latter produces and maintains data elements for City departments.

~~SUPERVISION RECEIVED AND EXERCISED~~ The incumbent R receives direction from an Information Systems Manager II - and may E exercises general supervision over Spatial Data Analysts ~~I, II, & III~~ and Spatial Database Analysts I, II, & III.

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

Consult with City departments to determine their spatial information (GIS) needs; identify and determine spatial data structures and application functions; define spatial data symbol and data architecture standards and procedures; evaluate and select spatial data modeling tools; prepare and document conceptual and logical spatial data models.

~~Supervise the production of spatial database designs from spatial data models for all spatial information systems.~~

~~Participate in the strategic planning process for Corporate Information Services.~~

Prepare detailed project schedules for activities in the ~~Spatial Data Administration section~~ GIS division.

Assist in maintaining enterprise data security.

Respond to inquiries from spatial data users in City departments.

Manage and support the City's multiple GIS platforms and spatial databases in high performance conditions and high availability including monitoring and enhancing database performance; plan

and perform database and GIS software upgrades and system migration; may require the use of programming language to directly query databases for database maintenance and administrative tasks.

Manage the City's geodatabase; coordinate and participate in the development and maintenance of GIS databases; post changes; verify and reconcile various geodatabase versions; compress, analyze, and rebuild the indexes, etc.; recommend procedures to enable access privileges; and oversee activity and process for updating city-wide spatial data.

Maintain GIS systems and data including all hardware, software, and software licenses; ensure all workstations, servers are working efficiently; and ensure data is easily accessible and is properly organized.

Perform GIS analysis for all departments; create maps, spatial databases, web-driven applications, spreadsheets, and statistics; provide maps and graphics to be included in various meeting agendas throughout the agency.

Provide GIS assistance and data to external agencies working with City departments.

Create and maintain ArcGIS REST services and Online applications.

Ensure that key datasets are up to date such as city-wide aerials, parcels, and jurisdiction/political boundaries.

Work with local jurisdictions in completing comprehensive, city-wide dataset such as General Plan, Existing Land Use, and active transportation.

Represent the City in technical meetings and coordinate plans with municipal and regional data managers to acquire, exchange, share, and integrate digital data.

Identify GIS issues and strategies; provide recommendations to City staff, and external agencies, elected officials and the public.

Assist in the development of goals, objectives, budgets, policies and procedures; investigate, interpret, analyze, and prepare recommendations in relation to proposals for new GIS programs, grants and/or services.

Attend, participate, and represent ITD at interdepartmental, interagency and professional meetings; stay abreast of new developments within assigned area of responsibility; maintain awareness of federal, state and local regulations.

May sSelect, supervise, and evaluate subordinate staff.

Prepare and administer a unit budget.

Provide training on priorities, policies, procedures, technology, and methodology to assigned staff.

Perform related duties as assigned.

QUALIFICATIONS KNOWLEDGE AND ABILITIES

Knowledge of:

- Theory, principles and practices of GIS including data compilation, database management, and spatial models.

- Principles and procedures used to design, develop, and maintain relational databases.
- Project management planning principles, tools, and techniques.
- Latest Environmental Systems Research Institute (ESRI) programs including ArcMap, ArcPro, ArcGIS Online, and ArcGIS Enterprise.
- Microsoft Office software (Word, PowerPoint, Access, and Excel).
- Scripting language(s) such as VB.net, C#, Javascript, and/or Python; application development using API editor such as Visual Studio.
- Database creation and maintenance.
- Quality assurance procedures and documentation standards for database systems.
- Administration and maintenance principles of network operating domains and specialized software applications.
- Management and organization of department policies and procedures.
- Recent and on-going developments, current literature, and sources of information related to the operations of assigned programs.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and City staff.
- Principles and practices of supervision and training.
- ~~Relational, object-oriented, and spatial database structures.~~
- ~~System design life cycle methodology, preferably "Data Driven."~~
- ~~Information engineering and object-oriented design techniques.~~
- ~~Principles and practices of computer programming and general systems design.~~
- ~~Budget development process, administration, and management.~~
- ~~Computer Aided Systems Engineering in support of strategic information planning, spatial data architecture development, business system planning, and SDLC implementation.~~
- ~~Project management and leadership techniques.~~

Ability to:

- Use ESRI software suite and other specialized application programming languages, including web-based applications.
- Operate a personal computer using specialized GIS software.
- Analyze, identify, and implement solutions to technical problems.
- Develop, manipulate, and analyze GIS information in a variety of formats.
- Understand and work with data from multiple organizations.
- Compile, organize, and present technical information in reports and inter-agency meetings.
- Assess and prioritize multiple tasks, projects and demands.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- ~~Analyze user's needs and develop data and process models that reflect those needs.~~
- ~~Manage the integration and migration of conceptual, logical and spatial data models into enterprise data models.~~
- ~~Coordinate projects between departments and OCIS.~~
- Prepare and monitor a unit budget.

- ~~Write technical data processing reports.~~
- Supervise, train, and evaluate assigned staff.
- Establish and maintain effective working relationships with those contacted in the performance of required duties.

EXPERIENCE AND EDUCATION**MINIMUM QUALIFICATIONS**

~~Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:~~ Any combination of education and experience that is equivalent to the following minimum qualifications may be acceptable:

Education:

A Bachelor's degree from an accredited college or university in computer science, management information systems, geography, electrical engineering, or a related field. A Master's degree or higher in a related field is desirable.

Experience:

Five (5) years of experience in the successful analysis and design of medium-to-large scale data processing systems, including two years of supervisory experience. Three (3) years of project management experience for medium-to-large projects is desirable.

LICENSE OR CERTIFICATE

None required.

OTHER REQUIREMENTS

None required.

DEPT. OF HUMAN RESOURCES MANAGEMENT USE ONLY			
Established:	07/22/1993	CSB Resolution #:	44287
Exempted:	Y <input type="checkbox"/> N <input type="checkbox"/>	Exemption Resolution #:	Salary Ordinance #:
Revision Date:	/ /	CSB Resolution #:	
Re-titled Date:	/ /	CSB Resolution #:	Salary Ordinance #:
(Previous title(s):)		



CIVIL SERVICE BOARD MEETING MINUTES (DRAFT)

Date: February 20, 2020

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 at 5:40 p.m.); Lauren Baranco (arrived at 5:42 p.m.); Yvonne Hudson-Harmon; Brooke Levin; Carmen Martinez; Beverly A. Williams (absent)

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

OPEN SESSION AGENDA

ROLL CALL

1) OPEN FORUM

2) APPROVAL OF THE FEBRUARY 20, 2020 CIVIL SERVICE BOARD MEETING AGENDA ACTION

44969 A motion was made by Board Member Hudson-Harmon and seconded by Board Member Levin to approve the February 20, 2020 Civil Service Board Meeting Agenda. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Hudson-Harmon, Levin, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Baranco, Johnson, Williams

3) UPDATES, SECRETARY TO THE BOARD INFORMATION

4) CONSENT CALENDAR: ACTION

a) Approval of Provisional Appointment

- Finance Department (1)
 - Human Services Department (1)
- b) Approval of Employee Requests for Leave of Absence
- Library Department (1)
 - Police Department (1)
- c) Approval of Revised Classification Specifications
- Head Start – Early Head Start Assistant Instructor, PT

44970 A motion was made by Board Member Levin and seconded by Board Member Hudson-Harmon to approve the Consent Calendar: Provisional Appointments, Employee Requests for Leave of Absence, and Approval of Revised Classification Specifications. The motion passed unanimously.

Votes: Board Member Ayes: 6 – Gourdine, Johnson, Baranco, Martinez, Hudson-Harmon, Levin

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

5) OLD BUSINESS:

- a) Approval of January 16, 2020 Civil Service Board Meeting Minutes ACTION

44971 A motion was made by Board Member Hudson-Harmon and seconded by Vice Chair Johnson to approve the January 16, 2020 Civil Service Board Meeting Minutes. The motion passed.

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

Board Member Noes: None
 Board Member Abstentions: Baranco
 Board Members Absent: Williams

- b) Approval of December 19, 2019 Civil Service Board Meeting Minutes ACTION

Due to lack of quorum of members present at the December 2019 meeting, approval of the December 19, 2019 Civil Service Board Meeting Minutes will carry over to the March 2020 meeting.

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

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

44972 A motion was made by Vice Chair Johnson and seconded by Member Levin to approve the July 18, 2019 Civil Service Board Meeting Minutes. The motion passed.

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

Board Member Noes: None
 Board Member Abstentions: Baranco, Hudson-Harmon
 Board Members Absent: Williams

- 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 - Draft Koff & Associates Report Regarding Information Technology Occupational Grouping INFORMATION

There was no a presenter on this topic; the report will be presented at the March 2020 meeting.

6) NEW BUSINESS:

- a) 6.06 – Appeal of Probationary Release PORT-2020-001 (J. Wilson) ACTION

The appellant requested the Board delay the appeal until the next meeting to allow for more time to prepare as a result of receiving the Port's response to the appeal on February 14, 2020. Chairperson Gourdine asked if the appellant received the documents by the time required, to which the appellant confirmed he did; however, wanted more time to prepare. Chairperson Gourdine advised the

requirements for the appeal were met and a delay would not be timely, but would consider a motion if made.

44973 A motion was made by Board Member Levin and seconded by Board Member Hudson-Harmon to deny the appellant’s request to delay the hearing. The motion passed unanimously.

Votes: Board Member Ayes: 6 – Gourdine, Johnson, Baranco, Martinez, Hudson-Harmon, Levin

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

44974 A motion was made by Board Member Levin and seconded by Board Member Hudson-Harmon to deny the appeal and uphold the decision of the Port Human Resources Department. The motion passed unanimously.

Votes: Board Member Ayes: 6 – Gourdine, Johnson, Baranco, Martinez, Hudson-Harmon, Levin

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

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: 6.06 – Appeal of Probationary Release: OPL-2019-001 (T. Dowell)

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

2) REPORT OF ACTIONS TAKEN IN CLOSED SESSION

With regard to the Personnel Matter for Public Employee: 6.06 - Appeal of Probationary Release: OPL-2019-001 (T. Dowell), Deputy City Vadim Sidelnikov reported that the Civil Service Board, by unanimous vote, voted to sustain the Appeal (OPL-2019-001) and reverse the decision to terminate employment. The Board's decision is to reinstate the employee to the position of Library Aide, PPT effective February 21, 2020. The Board also determined that an interruption of three (3) months occurred in the probationary period. As part of the reinstatement, the employee is to serve an additional three (3) month probationary period commencing February 21, 2020 and must receive two evaluations within the 90-days.

3) ADJOURNMENT

The meeting was adjourned at 7:45 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, March 19, 2020. All materials related to agenda items must be submitted by Thursday, March 5, 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, 2nd floor
Oakland, CA 94612
civilservice@oaklandca.gov



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

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CIVIL SERVICE BOARD MEETING MINUTES (DRAFT)

Date: December 19, 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 (absent); Lauren Baranco; Yvonne Hudson-Harmon (absent); Brooke Levin (absent); 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

44958 A motion was made by Board Member Williams and seconded by Board Member Martinez to approve the December 19, 2019 Civil Service Board Meeting Agenda. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

3) UPDATES, SECRETARY TO THE BOARD INFORMATION

Director Appleyard presented to the Board the most recent staffing report presented to City Council in November, 2019.

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

44959 A motion was made by Board Member Williams and seconded by Board Member Martinez to approve the Consent Calendar: Provisional Appointments, Employee Requests for Leave of Absence, and Approval of Revised Classification Specifications. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

5) OLD BUSINESS:

- a) Approval of November 14, 2019 Civil Service Board Meeting Minutes

ACTION

Due to lack of quorum of members present at the November 2019 meeting, approval of the November 14, 2019 Civil Service Board Meeting Minutes will carry over to the January 2020 meeting.

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

- 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 January 2020 meeting.

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

- c) Determination of Schedule of Outstanding Board Items ACTION

Denise Eaton-May, Esq. and Deputy City Attorney Caryl Casden spoke regarding Appeal OFD-2019-AP02. The parties have agreed to delay the appeal scheduled for this meeting and to request the Board allow the appeal to be heard by a mutually agreed upon Hearing Officer. The parties have secured dates for the Hearing Officer in February, 2020.

44960 A motion was made by Board Member Martinez and seconded by Board Member Williams to receive the Schedule of Outstanding Items, accept the request to postpone Appeal OFD-2019-AP02, and to assign Appeal OFD-2019-AP02 to a hearing officer. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

- 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

Report received and filed.

- e) Update on Common Class Study – Draft Koff & Associates Report INFORMATION
Regarding General, Administrative, Clerical, and Office Occupational
Grouping

There was one speaker on this item. Local 21 Chapter Vice President Jennifer Foster.

Report received and filed.

6) NEW BUSINESS:

- a) Approval of New Classification Specification for Fire Inspection ACTION
Supervisor

44961 A motion was made by Board Member Williams and seconded by Board Member Baranco to approve the new Classification Specification for Fire Inspection Supervisor. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

- b) Approval of New Classification Specification for Chief of Fire, ACTION
Assistant

44962 A motion was made by Board Member Williams and seconded by Board Member Martinez to approve the new Classification Specification for Chief of Fire, Assistant. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

- c) Approval of New Classification Specification for Capital ACTION
Improvement Coordinator, Assistant

44963 A motion was made by Board Member Martinez and seconded by Board Member Williams to approve the new Classification Specification for Capital Improvement Coordinator, Assistant. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

d) Approval of New Classification Specification for Ethics Analyst III

ACTION

44964 A motion was made by Board Member Williams and seconded by Board Member Baranco to approve the new Classification Specification for Ethics Analyst III. The motion passed unanimously.

Votes: Board Member Ayes: 4 – Gourdine, Williams, Baranco, Martinez

Board Member Noes: None

Board Member Abstentions: None

Board Members Absent: Johnson, Levin, Hudson-Harmon

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.

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**CIVIL SERVICE BOARD
 APPEALS & HEARINGS CALENDAR
 PENDING LIST – MARCH 19, 2020**

1. OPEN

Case Number	Classification	Dept.	Action Pending	Hearing Date	Notes/Next Steps
OPD-2020-AP01	Police Officer	Oakland Police Department	10.03 – Appeal of Disciplinary Action	TBD	Appellant has requested an outside hearing officer.

2. OTHER PENDING ITEMS

Date Requested	Subject	Report From	Date Due

3. CLOSED

Case Number	Classification	Dept.	Action Pending	Date Received	Notes
OFD-2019-AP02	Firefighter/ Paramedic	Oakland Fire Department	6.06 – Appeal of Probationary Release	December 19, 2019*	Withdrawn
OPL-2019-001	Library Aide, PPT	Oakland Public Library	6.06 – Appeal of Probationary Release		Heard at February 20, 2020 Meeting
PORT-2020-001	Port Maintenance Leader	Port of Oakland	6.06 – Appeal of Probationary Release		Heard at February 20, 2020 Meeting

4. UNDER REVIEW

Case Number	Classification	Dept.	Action Pending	Action Date	Notes



January 24, 2020

Point Factor Analysis –
Classification Comparison –
Information Technology
Occupational Grouping

Draft Report

Port of Oakland/City of Oakland

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APPENDICES

- Appendix I: Factor Evaluation System Description
- Appendix II: Classification Comparability Analysis



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.

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



Point Factor Analysis – Classification Comparison – Information Technology Grouping – Draft Report Port of Oakland

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
General Administrative, Clerical and Office (including graphics and production)	28	36
Accounting and Budget	17	28
Engineering, Architecture, Planning and Permitting	45	33
Information Technology	17	27
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

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,



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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.

FINDINGS

Comparison Classifications: Information Technology Occupational Grouping

Tables 2 and 3 display the Port and City classifications, respectively, that are categorized in the Information Technology 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.



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Table 2. Port Classifications – Information Technology Grouping

Port Classification Title	Potential Comparable Class – City
Information Technology Business Analyst I	No Comparable Classification
Information Technology Business Analyst II	Systems Analyst II
Business Systems Analyst	Systems Analyst II
Land Records Programmer	Spatial Analyst III
Maintenance Management Systems Coordinator	No Comparable Classification
MIS Customer Services Supervisor	-Computer Operations Supervisor -Information Systems Administrator
Port Principal Programmer/Analyst	Information Systems Administrator
Port Programmer/Analyst	No Comparable Classification
Port Senior Programmer/Analyst	Systems Analyst III
Port Systems Planning Analyst	Systems Analyst II
Port Technical Support Analyst I	No comparable classification
Port Technical Support Analyst II	No Comparable Classification
Port Technical Support Analyst III	No Comparable Classification
Port Technical Support Analyst IV	No Comparable Classification
Port Technical Support Specialist I	Help Desk Specialist
Port Technical Support Specialist II	-Help Desk Specialist -Computer Operator
Port Technical Support Specialist III	No Comparable Classification

Table 3. City Classifications – Information Technology Grouping

City Classification Title	Potential Comparable Class – Port
Computer Operations Supervisor	MIS Customer Services Supervisor
Computer Operator	Port Technical Support Specialist II
Senior Computer Operator	No Comparable Classification
Database Administrator	No Comparable Classification



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City Classification Title	Potential Comparable Class – Port
Database Analyst II	No Comparable Classification
Database Analyst III	No Comparable Classification
Electronics Supervisor	No Comparable Classification
Help Desk Specialist	-Port Technical Support Specialist I -Port Technical Support Specialist II
Information Systems Administrator	-Port Principal Programmer/Analyst -MIS Customer Services Supervisor
Information Systems Supervisor*	No Comparable Classification
Microsystems Systems Specialist I*	No Comparable Classification
Microsystems Systems Specialist II*	No Comparable Classification
Operations Shift Supervisor	No Comparable Classification
Spatial Data Analyst III	Land Records Programmer
Spatial Database Analyst III	No Comparable Classification
Systems Analyst I*	No Comparable Classification
Systems Analyst II	-Business Systems Analyst -IT Business Analyst II -Port Systems Planning Analyst
Systems Analyst III	No Comparable Classification
Systems Programmer II	No Comparable Classification
Systems Programmer III	No Comparable Classification
Telecommunication Systems Engineer	No Comparable Classification
Telecommunications Electrician*	No Comparable Classification
Senior Telecommunications Electrician*	No Comparable Classification
Telecommunications Supervisor	No Comparable Classification
Telecommunications Technician	No Comparable Classification
Telephone Services Specialist	No Comparable Classification
Web Specialist	No Comparable Classification

** indicates that the classification title is included on the list of the City’s classifications; however, there is no classification description available for evaluation.*



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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: Information Technology Group

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

Table 4. Analysis Summary

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Systems Analyst II	1700	Business Systems Analyst	1700	0	0%
Systems Analyst II	1700	IT Business Analyst II	1850	150	8.8%
Systems Analyst II	1700	Port Systems Planning Analyst	1850	150	8.8%
Systems Analyst III	2100	Port Senior Programmer/Analyst	2100	0	0%
Help Desk Specialist	1150	Port Technical Support Specialist I	850	300	35%
Help Desk Specialist	1150	Port Technical Support Specialist II	1100	50	4.5%
Computer Operations Supervisor	2000	MIS Customer Support Supervisor	2175	175	8.8%
Computer Operator	850	Port Technical Support Specialist I	850	0	0%
Spatial Data Analyst III	1650	Land Records Programmer	1300	350	26.9%



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Information Systems Administrator	2175	Port Principal Programmer/Analyst	2175	0	0%
Information Systems Administrator	2175	MIS Customer Services Supervisor	2175	0	0%

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. 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.

Overall, the City’s information technology classifications list duty statements that are more specialized and specific to certain functions, many of which are outdated. For example, the Computer Operator lists duty statements describing changing tapes for backup functions. Most jurisdictions no longer use tapes for backup and have moved towards server-based backup and disaster recovery methodologies. While the Port’s classifications appear more up to date, there are rapid changes in technology and systems such that elements of the Port’s specifications appeared possibly outdated as well.

In general, finding commonality amongst City and Port classifications that at face value, based on the class description alone, appear to have sufficiently similar purpose, scope, and complexity, proved to be challenging because the duty statements did not easily align. Therefore, several classifications, which may in fact be sufficiently similar, were deemed to have no comparable classification because the duty statements were not similar enough to be considered comparable. Analysis of supplementary documentation (e.g., incumbent questionnaires, position control documents, organization charts, etc.) may be warranted to determine if there are in fact no additional comparable classifications.

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.



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Table 5. Crosswalk of Similar Classifications

City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Systems Analyst II	\$8,497	Business Systems Analyst	Not available	0%	Not available
Systems Analyst II	\$8,497	Port Systems Planning Analyst	\$11,782	8.8%	38.7%
Systems Analyst III	\$10,327	Port Senior Programmer/Analyst	\$11,949	0%	15.7%
Help Desk Specialist	\$5,909	Port Technical Support Specialist II	\$10,153	4.5%	71.8%
Computer Operator	\$5,321	Port Technical Support Specialist I	Not available	0%	Not available
Computer Operations Supervisor	\$9,367	MIS Customer Services Supervisor	\$14,237	0%	52%
Information Systems Administrator	\$12,554	Port Principal Programmer/Analyst	\$13,950	0%	11%
Information Systems Administrator	\$12,554	MIS Customer Services Supervisor	\$14,237	0%	13.4%

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.



**Point Factor Analysis – Classification Comparison –
Information Technology Grouping – Draft Report
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Table 6. Potentially Similar Classifications

City Classification	Port Classification	Discussion
Spatial Data Analyst III (\$10,736)	Land Records Programmer (\$9,865)	The Land Records Programmer is responsible for computerized Geographic Information System programs which house spatial data. Similarly, the Spatial Data Analyst is responsible for systems requiring spatial data. Both classifications have substantially similar purpose; however, the supervisory control and knowledge level may be overstated for the City’s position resulting in the 26.9% difference in scoring.

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. Sufficiently Similar Classifications

City Classification	Port Classification
Systems Analyst II	Business Systems Analyst
Systems Analyst III	Port Senior Programmer/Analyst
Help Desk Specialist	Port Technical Support Specialist II
Computer Operator	Port Technical Support Specialist I
Information Systems Administrator	-Port Principal Programmer/Analyst -MIS Customer Services Supervisor

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 and duty statements of the classes.



**Point Factor Analysis – Classification Comparison –
Information Technology Grouping – Draft Report
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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.

Respectfully submitted by,
Koff & Associates

Georg Krammer
Chief Executive Officer



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

Level	Measure	Points	Comments
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;">OR</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;">OR</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;">OR</p> <p>Basic skill to operate equipment requiring some previous training or experience, such as keyboard equipment;</p> <p style="text-align: center;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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"> • Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods; <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Make decisions or recommendations significantly changing, interpreting, or developing important public policies or programs; <p style="text-align: center;">OR</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;">OR</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"> • Immediate Supervision 	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"> • General Supervision 	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"> • Direction 	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"> • General direction 	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"> • Administrative direction 	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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Information Technology Grouping – Draft Report
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Appendix II

Classification Comparability Analysis
Information Technology Occupational 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--Systems Analyst II	1	50		N	1-6	950	2-2	125	3-3	275	4-3	150	5-3	150	1700	Classes are substantially similar despite only having overlap in a couple of duty statements.
Port--Business Systems Analyst	1	50	N	N	1-6	950	2-2	125	3-3	275	4-3	150	5-3	150		
City--Systems Analyst II	1-1	50		N	1-6	950	2-2	125	3-3	275	4-3	150	5-3	150	1700	Low score for Comparability factor due to variability in duty statements between the two classes. The supervisory controls differ with the City class receiving general supervision and the Port class receiving direction. Otherwise, the classes are comparable.
Port--IT Business Analyst II	1-1	50	N	N	1-6	950	2-3	275	3-3	275	4-3	150	5-3	150		
City--Systems Analyst II	1-1	50		N	1-6	950	2-2	125	3-3	275	4-3	150	5-3	150	1700	The job descriptions are very outdated; however, it is likely that these classes are very close in scope and complexity.
Port--Port Systems Planning Analyst	1-1	50	N	N	1-6	950	2-2	125	3-3	275	4-3	150	5-4	225		
City--Systems Analyst III	1-1	50		L	1-6	950	2-3	275	3-4	450	4-3	150	5-4	225	2100	Classes are similar; duty statements vary but scope, complexity, knowledge, supervision received are the same.
Port--Port Senior Programmer/Analyst	1-1	50	E	L	1-6	950	2-3	275	3-4	450	4-3	150	5-4	225		
City--Help Desk Specialist	1-1	50		N	1-4	550	2-2	125	3-2	125	4-3	150	5-3	150	1150	Classes have similarities with respect to supervisory controls, guidelines, and scope and effect of the work but the duty statements vary from one another and the Port Technical Support Specialist I is identified as the entry level in a class series.
Port--Port Technical Support Specialist I	1-1	50	N	N	1-3	350	2-1	25	3-2	125	4-3	150	5-3	150		
City--Help Desk Specialist	1-1	50		N	1-4	550	2-2	125	3-2	125	4-3	150	5-3	150	1150	Classes are substantially similar.
Port--Port Technical Support Specialist II	1-1	50	N	N	1-3	350	2-2	125	3-3	275	4-3	150	5-3	150		

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

CLASSIFICATION COMPARABILITY ANALYSIS
Information Technology Classification 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--Computer Operations Supervisor	1-1	50		D	1-6	950	2-3	275	3-3	275	4-4	225	5-4	225	2000	These classifications are similar except that the guidelines for the work of the Port's class are more scarce and abstract than those for the City's class. Duty statements vary between the classes.
Port--MIS Customer Services Supervisor	1-1	50	E	D	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225		
City--Computer Operator	1-1	50		N	1-3	350	2-1	25	3-2	125	4-3	150	5-3	150	850	The City--Computer Operator job description is very outdated and is difficult to analyze. The likelihood that the incumbents are using backup tapes is low as that is outdated technology. The comparability rating would likely be higher with up to date specs.
Port--Technical Support Specialist I	1-1	50	N	N	1-3	350	2-1	25	3-2	125	4-3	150	5-3	150		
City--Spatial Data Analyst III	1-1	50		L	1-5	750	2-3	275	3-3	275	4-3	150	5-3	150	1650	These classes are somewhat similar; it appears that the knowledge level and supervisory controls may be overstated for the City class by comparison to the duties the class is performing. Additionally, the City's class is identified as a lead classification whereas the Port's is not.
Port--Land Records Programmer	1-1	50	E	N	1-4	550	2-2	125	3-3	275	4-3	150	5-3	150		
City--Information Systems Administrator	1-1	50		D	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225	2175	Substantially similar classes
Port--Port Principal Prog/Analyst	1-1	50	E	D	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225		
City--Information System Administrator	1-1	50		D	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225	2175	Substantially similar classes.
Port--MIS Customer Services Supervisor	1-1	50	E	D	1-6	950	2-3	275	3-4	450	4-4	225	5-4	225		

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



March 5, 2020

Point Factor Analysis –
Classification Comparison –
Business and Industry
Occupational Grouping

Draft Report

Port of Oakland/City of Oakland

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APPENDICES

- Appendix I: Factor Evaluation System Description
- Appendix II: Classification Comparability Analysis



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.

To this end, 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.

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



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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
General Administrative, Clerical and Office (including graphics and production)	22	21
Accounting and Budget	17	28
Engineering, Architecture, Planning and Permitting	45	33
Information Technology	20	34
<i>Business and industry (including purchasing, contracts, workers' compensation, and property management)</i>	18	19
Inspection, Investigation, Enforcement, Compliance	6	9
Trades	37	52
Information and Arts	9	8

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

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.



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- **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.

FINDINGS

Comparison Classifications: Business and Industry Group

Tables 2 and 3 display the Port and City classifications, respectively, that are categorized in the Business and Industry 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.



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Table 2. Port Classifications – Business and Industry Occupational Grouping

PORT CLASSES	POTENTIAL CITY CLASSES
Assistant Contract Compliance Officer	Contract Compliance Field Technician Contract Compliance Officer Assistant
Assistant Commercial Real Estate Representative	Real Estate Agent
Contract Compliance Officer	Contract Compliance Field Technician Contract Compliance Officer Assistant Contract Compliance Officer
Documentation & Stats Assistant	Business Analyst I/II/III/IV
Port Grants Coordinator	Business Analyst I/II/III/IV Grants Coordinator
Port Insurance Analyst	Claims Investigator II
Port Insurance Technician	No Comparable
Port Senior Risk Management Analyst	Claims Investigator II Employee Fleet & Safety Coordinator Safety & Loss Control Specialist
Procurement Analyst	Buyer
Properties Assistant	Real Estate Agent
Risk Management Analyst	Claims Investigator II Employee Fleet & Safety Coordinator Safety & Loss Control Specialist
Senior Procurement Analyst	Buyer
Senior Commercial Real Estate Representative	Real Estate Agent
Workers' Comp Claims Technician	Employee Fleet & Safety Coordinator



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PORT CLASSES	POTENTIAL CITY CLASSES
Workers' Compensation Administrator	Claims Investigator II
Workers' Compensation Analyst	Claims Investigator II Safety & Loss Control Specialist

Table 3. City Classifications – Business and Industry Occupational Grouping

CITY CLASSES	POTENTIAL PORT CLASSES
Business Analyst I	No Comparable
Business Analyst II	No Comparable
Business Analyst III	No Comparable
Business Analyst IV	No Comparable
Buyer	Procurement Analyst Senior Procurement Analyst
Claims Investigator II	Port Insurance Analyst Workers' Compensation Analyst Risk Management Analyst Port Senior Risk Management Analyst Workers' Compensation Claims Technician Workers' Compensation Administrator
Contract Compliance Field Technician	Assist Contract Compliance Officer Contract Compliance Officer
Contract Compliance Officer, Assistant	Assist Contract Compliance Officer Contract Compliance Officer
Contract Compliance Officer	Contract Compliance Officer
Contract Compliance Officer, Senior	Contract Compliance Officer
CPRB Policy Analyst	No Comparable
Development Specialist III	No Comparable



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Business and Industry Occupational Grouping – Draft Report
Port of Oakland**

CITY CLASSES	POTENTIAL PORT CLASSES
Employee Fleet & Safety Coordinator	Risk Management Analyst Port Senior Risk Management Analyst Workers' Comp Claims Technician Workers' Compensation Administrator
Employment Services Representative	No Comparable
Grants Coordinator	Port Grants Coordinator
Real Estate Agent	Properties Assistant Senior Commercial Real Estate Representative Assistant Commercial Real Estate Representative
Safety & Loss Control Specialist	Workers' Compensation Analyst Risk Management Analyst Port Senior Risk Management Analyst
Urban Economic Analyst IV, Projects	No Comparable
Urban Economic Coordinator	No Comparable

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.



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Comparability Scoring: Business and Industry Group

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

Table 4. Analysis Summary

City Classification	Score	Port Classification	Score	Point Value Differential	Percentage Differential
Buyer	1800	Senior Procurement Analyst	2250	450	25%
Buyer	2200	Procurement Analyst	2200	0	0%
Claims Investigator II	2150	Workers' Compensation Administrator	2225	75	3.5%
Assistant Contract Compliance Officer	1000	Assistant Contract Compliance Officer	1325	325	32.5%
Contract Compliance Officer	2900	Contract Compliance Officer	2900	0	0%
Grants Coordinator	2175	Grants Coordinator	1825	350	19%

Of note, the score for the City's Buyer classification is different when compared to different classifications within the other agency. Since the comparability rating for any given classification is dependent upon the classification to which it is being compared, and since the final score includes the comparability rating, the final score for any given classification is not static and will be different from one comparison rating to another.

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 the final scores of each.

Table 5. Crosswalk of Similar Classifications

City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Buyer	\$7,707	Procurement Analyst	\$10,457	0%	35.7%



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City Classification	Monthly Salary	Port Classification	Maximum Monthly Salary	PFA Score Differential	Salary Differential
Claims Investigator II	\$8,092	Workers' Compensation Administrator	Not Available	3.5%	Not Available
Contract Compliance Officer	\$8,752	Contract Compliance Officer	\$10,640	0%	21.6%

Of note, the City's classification system has clear distinctions in the assignment of duties among the focus areas for insurance, claims, occupational safety, health and hygiene, and risk management functions whereby classifications tend to have specialty areas whereas the Port has broader classifications which encompass multiple functional areas which accounts for the few classifications which are sufficiently similar.

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
Assistant Contract Compliance Officer (\$6,990/mo.)	Assistant Contract Compliance Officer (\$9,396/mo.)	The City's classification includes duties that have a learns-and-assists inclination whereas the Port classification is described as performing duties more independently. It is likely that the differences in factor scores for these classes can be attributed to the narrative of the class descriptions more so than differences in the actual work performed.

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



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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
Buyer	Procurement Analyst
Claims Investigator II	Workers' Compensation Administrator
Contract Compliance Officer	Contract Compliance Officer

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.

Respectfully submitted by,
Koff & Associates

Georg Krammer
Chief Executive Officer



Appendix I

Factor Evaluation System Description

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

Based Upon Broad Comparability First Ten Duty Statements in Class Specification

Level	Measure	Points	Comments
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;">OR</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;">OR</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;">OR</p> <p>Basic skill to operate equipment requiring some previous training or experience, such as keyboard equipment;</p> <p style="text-align: center;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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;">OR</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"> • Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods; <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Make decisions or recommendations significantly changing, interpreting, or developing important public policies or programs; <p style="text-align: center;">OR</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;">OR</p> <p>Equivalent knowledge and skill.</p>	1,850

FES Factor 2 - Supervisory Controls

Supervisory controls covers 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"> • Immediate Supervision 	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.</p> <p>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"> • General Supervision 	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"> • Direction 	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"> • General direction 	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"> • Administrative direction 	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



Appendix II

Classification Comparability Analysis
Business and Industry Occupational 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- Buyer	Comp-2	350		N	1-5	750	2-2	125	3-3	275	4-4	225	5-2	75	1800	The Port's class is described with higher level responsibilities around strategic planning, policy development, and innovation around purchasing techniques and procedures.
Port-Senior Procurement Analyst	Comp-2	350	E	L	1-6	950	2-3	275	3-3	275	4-5	325	5-2	75	2250	
City- Buyer	Comp-3	750		N	1-5	750	2-2	125	3-3	275	4-4	225	5-2	75	2200	The Port and City classes are comparable in all factors measured.
Port- Procurement Analyst	Comp-3	750	N	N	1-5	750	2-2	125	3-3	275	4-4	225	5-2	75	2200	
City- Claims Investigator II	Comp-2	350		N	1-6	950	2-2	125	3-3	275	4-4	225	5-4	225	2150	Overall point value differential is less than 4% so these classes as very similar. Scope and effect score is lower for the Port class since duties are confined to Workers' Compensation.
Port- Workers' Compensation Administrator	Comp-2	350	E	D	1-6	950	2-3	275	3-3	275	4-4	225	5-3	150	2225	
City- Assistant Contract Compliance Officer	Comp-1	50		N	1-4	550	2-2	125	3-2	125	4-2	75	5-2	75	1000	City duty statements indicate the class performs duties in an "assist" capacity whereas the Port's class indicates more independent performance of duties. These classes are likely more similar than the point value conveys. The
Port- Assistant Contract Compliance Officer	Comp-1	50	E	N	1-5	750	2-1	25	3-3	275	4-3	150	5-2	75	1325	
City- Contract Compliance Officer	Comp-4	1250		L	1-6	950	2-2	125	3-3	275	4-4	225	5-2	75	2900	The Port and City classes are comparable in all factors measured.
Port- Contract Compliance Officer	Comp-4	1250	E	N	1-6	950	2-2	125	3-3	275	4-4	225	5-2	75	2900	
City - Grants Coordinator	Comp-2	350		L	1-6	950	2-3	275	3-2	125	4-5	325	5-3	150	2175	Overarching duties and breadth of responsibilities for these two classes result in a considerable points differential.
Port Grants Coordinator	Comp-2	350	N	N	1-5	750	2-2	125	3-2	125	4-5	325	5-3	150	1825	

Supervision Legend:

- N = None
- L = Lead
- D = Direct