



**Item #06-6-8
Action**

SACOG Board of Directors

June 8, 2006

Classification Plan

Issue: Approval of a revised Classification Plan.

Recommendation: The Administration Committee recommends that the Board of Directors approve the two attached amendments to the Classification Plan.

Committee Action/Discussion: 1) The Clerk of the Board is currently assigned to salary range 27, which is 5% ahead of the Assistant Planner and 10% behind the Associate Planner. In light of the increased complexity of the job with a 31-member Board of Directors and five standing committees, and given that the position's level of responsibility is similar to that of an Associate Planner, it is proposed to reassign the position from salary range 27 to salary range 29.

2) All of SACOG's Senior Planners and Senior Research Analysts have specialized expertise and manage one or more projects, some have modest supervisory responsibilities, and some have substantial responsibility to supervise other less-experienced staff and to exercise technical and functional supervision over other senior staff. To appropriately compensate those who successfully take on this higher level of supervisory responsibility – and to overcome the challenge of retaining good staff in a relatively fixed-size and small organization – we propose to create the new classifications of Supervising Senior Planner and Supervising Senior Research Analyst; to assign these to salary range 33, which is 5% higher than the Senior range; and to authorize these classifications for flexible staffing. Flexible staffing allows the Executive Director to internally promote employees within a class series without advertising the position, but does not preclude choosing to determine advancement through a competitive selection method.

Consistent with the recommendations on the Salary Plan on this agenda, the attached amendments to the classification plan include deletion of the salary range assignments for the four director positions.

Approved by:

Mike McKeever
Executive Director

MM:KH:gg
Attachment

Key Staff: Karen Wilcox, Director of Finance, (916) 340-6210
Kenneth Hough, Director of Community Planning & Operations, (916) 340-6229

FLEXIBLE STAFFING

Flexible staffing allows the Executive Director to internally promote employees within a class series containing trainee-level, entry-level, journey-level and—in some cases as defined below—advanced journey/supervisory-level positions without advertising the position to other applicants. It also allows the flexibility to hire employees at the trainee, entry, journey, or advance journey/supervisory level dependent upon applicant qualifications and staffing needs and place them on a logical career ladder.

After gaining the experience and knowledge to perform the full range of journey-level tasks, and fulfilling any special requirements for the journey level, an entry-level employee could reasonably expect to progress to the journey level based upon the judgment of management. Flexible staffing does not mean that every employee can expect to advance through all the levels: in all cases, advancement is dependent on job performance, the complexity of duties and the needs of the agency. Agency needs include the need to maintain a balanced budget.

The availability of the flexible staffing option does not preclude the Executive Director from choosing to determine advancement through a competitive selection method.

The following classifications are authorized for flexible staffing:

- Accountant I/II/III
- Administrative Assistant I/II/III/Administrative Coordinator I/II/Clerk of the Board
- Administrative Clerk I/II/III
- Assistant Research Analyst/Associate Research Analyst/Senior Research Analyst/Supervising Senior Research Analyst
- Graphic Designer I/II/Associate Graphic Designer/Senior Graphic Designer
- Information Technology Analyst I/II/Associate IT Analyst/Senior IT Analyst
- Junior Planner/Assistant Planner/Associate Planner/Senior Planner/Supervising Senior Planner

CLASSIFICATION LIST

The approved classification plan includes the following class series and classifications:

Current Class	Salary Range	Prior Class	Salary Range
<u>Accounting Classes</u>			
Accounting Technician	20	Accounting Technician	20
Accountant I	22	Accountant I	22
Accountant II	26	Accountant II	26
Accountant III	29	N/A	N/A
Senior Accountant	32	Senior Accountant	32
<u>Administrative Classes</u>			
Administrative Clerk I	14	Administrative Clerk I	14
Administrative Clerk II	16	Administrative Clerk II	16
Administrative Clerk III	18	Senior Administrative Clerk	18
Administrative Assistant I	20	Administrative Assistant I	20
Administrative Assistant II	22	Administrative Assistant II	22
Administrative Assistant III	25	N/A	N/A
Administrative Coordinator I	25	Administrative Coordinator I	25
Administrative Coordinator II	27	Administrative Coordinator II	27
Clerk of the Board	27-29	Administrative Coordinator II	27
<u>Communications Classes</u>			
Graphic Designer I	22	Graphic Designer I	22
Graphic Designer II	26	Graphic Designer II	26
Associate Graphic Designer	29	Associate Graphic Designer	29
Senior Graphic Designer	32	N/A	N/A
Public Information Coordinator I	22	Public Information Coordinator I	22
Public Information Coordinator II	26	Public Information Coordinator II	26
Associate Public Information Coordinator	29	Associate Public Information Coordinator	29
Senior Public Information Coordinator	32	N/A	N/A
<u>Executive Classes</u>			
Director of Community Planning & Operations	40-N/A	Director of Community Planning & Operations	40
Director of Finance	38-N/A	Director of Finance	38
Director of Research & Analysis	38-N/A	Director of Research & Analysis	38
Director of Transportation Planning	41-N/A	Director of Transportation Planning	41
Executive Director	N/A	Executive Director	N/A

Current Class	Salary Range	Prior Class	Salary Range
<u>Information Technology Classes</u>			
Information Technology Analyst I	22	Information Technology Analyst I	22
Information Technology Analyst II	26	Information Technology Analyst II	26
Associate Information Technology Analyst	29	N/A	N/A
Senior Information Technology Analyst	32	Senior Information Technology Analyst	32
<u>Management Classes</u>			
Manager of Communications	35	Manager of Communications	35
Project Delivery Manager	35	Project Delivery Manager	35
Principal Program Expert	35	Principal Program Expert	35
Principal Project Expert	38	Principal Project Expert	38
<u>Planning Classes</u>			
Junior Planner	23	Junior Planner	23
Assistant Planner	26	Assistant Planner	26
Associate Planner	29	Associate Planner	29
Senior Planner	32	Senior Planner	32
Supervising Senior Planner	33	N/A	N/A
<u>Research Analyst Classes</u>			
Research Technician	22	N/A	N/A
N/A	N/A	Junior GIS Analyst	23
Assistant Research Analyst	26	Assistant GIS Analyst	26
Associate Research Analyst	29	Associate GIS Analyst	29
Senior Research Analyst	32	Senior GIS Analyst	32
Supervising Senior Research Analyst	33	N/A	N/A
<u>Other Classes</u>			
Staff Assistant	14	Staff Assistant	N/A
Student Intern	*	Student Intern	N/A

*Student interns have a separate hourly wage schedule.

PLANNING CLASSES

**JUNIOR PLANNER
ASSISTANT PLANNER
ASSOCIATE PLANNER
SENIOR PLANNER**

SUPERVISING SENIOR PLANNER

DEFINITION

To perform professional planning duties in an assigned area of responsibility including transit, transportation, land use, air quality, housing or other planning areas.

DISTINGUISHING CHARACTERISTICS

Junior Planner

This is the trainee-level class in the Planner series. This class is distinguished from the Assistant Planner in that Junior Planner is designed for individuals with the required education, but no directly related work experience. Employees at this level perform duties in a training capacity, under close, immediate supervision. An Assistant Planner has some directly related work experience, and performs routine professional duties with minimal supervision, while learning the more complex duties.

Assistant Planner

This is the entry-level class in the Planner series. This class is distinguished from the Associate Planner by the performance of the more routine professional tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate Planner level. Positions in this class are flexibly staffed and may be filled by advancement from the Junior Planner level.

Associate Planner

This is the full journey-level class within the Planner series. Positions at this level are distinguished from Junior Planner and Assistant Planner by assuming full responsibility for projects and performing more difficult and responsible duties, including project management. Employees at this level may provide lead supervision over lower-level professional personnel or direct supervision over clerical or technical personnel. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from Assistant Planner level. In some cases, depending upon complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Assistant Planner level.

Senior Planner

This is the advanced journey/supervisory-level class in the Planner series. Positions at this level are distinguished from other classes within the series by assuming full responsibility for major, highly complex projects and providing specialized expertise. Employees perform the most difficult and responsible duties assigned to classes within this series and typically supervise professional Planners. Incumbents are given management-level responsibility for a major segment of the work program, and perform complex professional planning duties requiring specialized training and experience. Positions in this class are flexibly staffed and may be filled by advancement from Associate Planner level. In some cases, depending upon complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Associate Planner level.

Supervising Senior Planner

Positions at this level are distinguished from other classes within the series by having substantial supervisory responsibilities. Positions in this class are flexibly staffed and may be filled by advancement from the Senior Planner level. In some cases, depending upon the amount of supervisory responsibility, job performance, and the needs of the agency, an employee may remain classified at the Senior Planner level.

SUPERVISION RECEIVED AND EXERCISED

Junior Planner

Receives immediate supervision from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position. May receive technical and functional supervision from an Associate Planner.

Assistant Planner

Receives general supervision from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position. May receive direct or technical and functional supervision from an Associate Planner.

May provide technical and functional supervision to less experienced professional, technical, or clerical personnel.

Associate Planner

Receives direction from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position.

May exercise direct or technical and functional supervision over less experienced professional Planners or clerical or technical personnel.

Senior Planner

Receives general direction from a Director, the Project Delivery Manager, or another management position.

Typically exercises direct supervision over less experienced professional Planners or clerical or technical personnel. Exercises technical and functional project over professional positions.

Supervising Senior Planner

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional planners as well as technical and functional supervision over experienced staff, including senior planners.

EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Gathers a variety of information and data for the preparation of planning reports and studies.
- Performs specific office and field assignments in connection with planning and development within the region; compiles statistics and engages in research preparatory to various phases of planning projects; develops maps, charts and graphs used in planning studies and reports.
- Assists in compiling, arranging, analyzing and interpreting data; analyzes and summarizes compiled data and presents them in the form of reports, tables or statistical analyses.
- Assists in making comparative studies of land use, population structure, economic activities, housing, transportation, environmental factors and related subjects.
- Researches, investigates and surveys available sources for information used in planning studies and related projects.
- Answers inquiries and assists the public in matters relating to the functions of SACOG.
- Assists in preparation of grant applications for planning projects.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Plans and prepares moderately complex planning projects or significant portions of complex projects.
- Performs related duties as assigned.

Additional duties performed by an Associate Planner include:

- Plans, directs and reviews the conduct of complex studies relating to land use, transportation, population, environment and related areas of planning.
- Assists in preparation of the work program; identifies areas requiring study and research.
- Assigns work activities and tasks to professional personnel.
- Provides assistance to local agencies in the development of grant proposals.
- Forms, coordinates and facilitates local government committees regarding policy and technical planning issues.

- Reviews proposals, making difficult determinations regarding the extent to which proposals meet established standards and criteria.
- Responds to detailed or difficult requests for information from local agencies, consultants and other groups and individuals.
- Independently performs difficult research work, applying specialized research and analytical methods and techniques.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Represents SACOG before legislative and administrative bodies of member agencies and other groups.
- Prepares requests for proposals; organizes consultant selection; develops scopes of work for complex planning projects.
- Presents reports to the public, the media, technical and policy committees and boards of elected officials, including SACOG's Board of Directors.
- Develops proposed policies, works with member jurisdictions, prepares reports and monitors project status to ensure that the region delivers projects and maintains project funding.
- Interprets programming laws, guidelines and regulations and answers questions for SACOG's Board of Directors, member jurisdictions and the general public.

Additional duties performed by a Senior Planner include:

- Supervises, trains and evaluates professional planning staff.
- Manages a major section of the work program, using specialized expertise.
- Conducts complex, technical analyses of transportation plans, corridor studies and air quality conformity; summarizes analyses in clear and concise reports.

Additional duties performed by a Supervising Senior Planner include:

- Directly supervises multiple, less-experienced professional planners and exercises technical and functional supervision over experienced staff, including Senior Planners.

MINIMUM QUALIFICATIONS

Junior Planner

Knowledge of:

- Principles and techniques of research and statistical analysis.
- Principles, concepts and techniques of planning.
- Principles and practices of computers.

Ability to:

- Gather, compile and analyze technical and statistical data.
- Analyze situations accurately and adopt effective courses of action.
- Learn applicable laws and regulations.

- GIS software programs, data sources and data collection and management procedures.

Ability to:

- Assume independent responsibility for major regional and local planning projects.
- Perform difficult grant review work.
- Supervise, train and evaluate assigned staff.
- Effectively present proposals and ideas to SACOG, local officials, and other interested groups and individuals.

Experience and Training:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Four years of increasingly responsible professional planning experience, preferably including some supervisory experience.

Supervising Senior Planner

In addition to the qualifications of the Senior Planner:

Knowledge of:

- Principles and practices of team leadership.

Ability to:

- Effectively lead teams of professional planning staff in conducting multiple and complex planning projects.

Experience and Training:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Five years of increasingly responsible professional planning experience, including two years in a supervisory capacity.

**ASSISTANT RESEARCH ANALYST
ASSOCIATE RESEARCH ANALYST
SENIOR RESEARCH ANALYST
SUPERVISING SENIOR RESEARCH ANALYST**

DEFINITION

To assist in professional research, planning and analysis duties, to assist others in the use of transportation planning data and applications; and to respond to a variety of requests for reports, maps and analyses. There are several professional practices and disciplines included in the Research Analyst series. These include Demographics, Geographic Information Systems, Travel Demand Modeling, and Air Quality Modeling. Other disciplines could include Economics and Statistics. Working titles may reflect these disciplines.

DISTINGUISHING CHARACTERISTICS

Assistant Research Analyst

This is the entry-level class in the Research Analyst series. This class is distinguished from the Associate Research Analyst by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate level.

Associate Research Analyst

This is the full journey-level class within the Research Analyst series. This class is distinguished from the Assistant Research Analyst by the assignment of the more complex and varied duties assigned to the class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Assistant Research Analyst level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Assistant Research Analyst level. The Associate Research Analyst is distinguished from the Senior Research Analyst in that the latter is responsible for supervising lower-level Research Analysts and is assigned the most complex and varied projects.

Senior Research Analyst

This is the advanced journey/supervisory-level class within the Research Analyst series. Positions at this level are distinguished from other classes within the series by the level of independence, the degree of responsibility assumed and level of complexity in assigned tasks. Incumbents perform the most difficult and responsible duties assigned to classes within this series and typically provide direct supervision to less experienced personnel. They are often given management-level responsibility for a major segment of research and analysis and perform complex technical duties requiring specialized training and experience. Positions in this class are flexibly staffed and may be filled by advancement from the Associate Research Analyst level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Associate Research Analyst level.

Supervising Senior Research Analyst

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional research analysts as well as technical and functional supervision over experienced staff, including senior research analysts.

SUPERVISION RECEIVED AND EXERCISED

Assistant Research Analyst

Receives general supervision from the Director of Research and Analysis or another supervisory position.

Associate Research Analyst

Receives direction from the Director of Research and Analysis or another supervisory position. May exercise functional and technical supervision over interns, clerical, technical, or professional personnel.

Senior Research Analyst

Receives direction from the Director of Research and Analysis or another supervisory position. Typically exercises direct supervision over less experienced professional and technical personnel. Exercises technical and functional project supervision over professional positions.

Supervising Senior Research Analyst

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional research analysts as well as technical and functional supervision over experienced staff, including senior research analysts.

EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Assists in the design and implementation of planning, modeling, research and analysis projects using various software packages.
- Assists in gathering, digitizing, analyzing and interpreting transportation and socioeconomic data.
- Prepares maps displaying a wide variety of geographic information.
- Prepares and maintains required tables and reports.
- Conducts research and analysis on database development.

- Provides technical assistance and training to casual internal GIS, modeling and statistical software users and local jurisdictions; answers questions and explains GIS, modeling and statistical procedures; conducts user seminars and workshops.
- Performs system GIS, modeling and statistical programming tasks using various software products and programming languages.
- Participates in decisions relating to the selection and purchase of hardware and software.
- Assists in preparation of the work program; identifies areas requiring study and research.
- Oversees the orderly development and maintenance of the regional databases for modeling, GIS and other analyses; designs and develops projects and programs for the maintenance of data.
- Performs complex system and scripting/programming tasks using various software products and programming languages.
- Coordinates, prioritizes and evaluates the work assigned to the section.
- Assists staff and member jurisdictions in defining research and analysis needs and obtaining products to meet these needs.
- Coordinates research projects with internal staff and external agencies; facilitates meetings; oversees consultant contracts.
- Independently performs difficult research work, applying specialized research and analytical methods and techniques.
- Prepares requests for proposals; organizes consultant selection; and develops scopes of work for highly complex research projects.
- Supervises, trains and evaluates professional Research Analyst staff.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Assists in developing and operating travel demand models for the region; manages the travel data collection; develops databases to support travel demand models and management systems.
- Reviews proposals, making difficult determinations regarding the extent to which proposals meet established standards and criteria.
- Conducts research on travel, land use and air quality forecasting methods.
- Presents reports to the public, the media, technical and policy committees and boards of elected officials, including the SACOG's Board of Directors.
- Performs related duties as assigned.

Additional duties performed by a Supervising Senior Research Analyst include:

- **Directly supervises multiple, less-experienced professional planners and exercises technical and functional supervision over experienced staff, including Senior Research Analysts.**

- Multiple software packages for GIS, travel demand modeling or statistical analysis.
- Computer hardware, operating system software and data communications equipment.
- Methods and techniques of data collection used for projects related to SACOG's research and analysis.
- Local and regional planning data and mapping needs.
- Census data and geography.
- Principles and practices of regional and local planning.
- Organization and functions of the various agencies involved in regional planning.

Ability to:

- Supervise, train and evaluate assigned personnel.
- Work with GIS, travel model or statistical software.
- Design and implement effective and efficient research and analysis methodologies.
- Write programs and/scripts to perform data processing and analysis tasks.
- Assume independent responsibility for major research and planning-related projects.
- Collect, analyze and interpret technical and statistical data.
- Identify appropriate hardware and software for research and analysis needs.
- Make clear and concise presentations to public groups.
- Organize and facilitate meetings and multi-agency teams.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Four years of professional experience in a research and planning-oriented environment, preferably including some supervisory experience.

Training:

Master's degree may be substituted for two years of professional experience.

Supervising Senior Research Analyst

In addition to the qualifications of the Senior Research Analyst:

Knowledge of:

- **Principles and practices of team leadership.**

Ability to:

- Effectively lead teams of professional research and analysis staff in conducting multiple and complex research projects.

Experience and Training:

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Five years of increasingly responsible professional research and analysis experience, including two years in a supervisory capacity.