

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT

POLICIES & PROCEDURES MANUAL

POLICY 31.160 - CLASSIFICATION/COMPENSATION PLAN MAINTENANCE

Date: July 1, 2023
Revision: 9
Supersedes: July 2022
First Adopted: March, 2005

1. POLICY

1.1 The City of San Bernardino Municipal Water Department has a vital interest in maintaining a current and competitive classification/compensation plan in the interest of attracting, retaining, and motivating employees.

1.2 The Water Department has established a policy with guidelines for classification/compensation plan maintenance; however, the General Manager of the Water Department maintains the right to determine if and when it will conduct classification and/or compensation studies based on organizational need, current fiscal environment, and other related factors. The results of any study authorized by the General Manager will be brought before the Water Board for approval.

1.3 The Water Department further expresses its intent through this policy to comply with federal and state rules, regulations, or laws that relate to equal treatment including, but not limited to, the Fair Labor Standards Act (FLSA), Equal Pay Act, and California Fair Pay Act. Further this policy affirms its commitment to non-discrimination in the payment of wages on the basis of any protected category as defined under Title VII of the Civil Rights Act.

1.4 As a condition of employment, all employees are required to abide by the terms of this policy. Employees are to notify the Water Department's management through the appropriate chain of command and/or the Human Resources Manager, concerning any issues related to job classification and/or compensation.

2. PURPOSE

This policy outlines the goals and objectives of the Water Department's classification/compensation plan maintenance. The policy further provides guidance to supervisors and managers concerning their responsibilities in submitting classification study requests that include a) reclassification of a position, b) reorganization, c) establishment of a new position, and d) equity review of a classification.

SCOPE

This policy applies to all sections of the Department and all employees with the exception of temporary and contracted employees.

3. DEFINITIONS

3.1 **Salary Plan** includes San Bernardino Municipal Water Department's pay schedules and the means by which pay is adjusted, such as merit, promotional and reclassification increases, equity review increases, reductions in pay due to demotions or discipline, and differential/assignment payments. Several of these policies originate in Memoranda of Understanding and/or Salary Resolutions.

3.2 **Classification Plan** shall provide for the grouping into classes of all positions in the organization which are sufficiently alike in essential duties and responsibilities to be assigned the same descriptive title, to be assigned the same salary range, to be given the same examination or other selection device for appointment or promotion, and to require substantially the same qualifications (in terms of experience, education, knowledge, skills, and abilities) on the part of applicants or employees.

3.3 **Reclassification** means the reallocation of a single position or multiple positions in one class to a different class as a result of a significant change in the level of duties, responsibilities, and/or qualification requirements of the position as a result of an identifiable and/or quantifiable cause. Title changes only are included in this category.

3.4 **Reorganization** is a change of structure within a section or division involving multiple positions, which enhances the efficiency and effectiveness of the Department as

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it relates to goals and/or services provided.

3.5 **New Position** is the creation of a position requiring an evaluation of proposed duties and responsibilities, and related knowledge, skills, and abilities required to perform the work, in order to determine an appropriate job classification. This evaluation may result in the use of an existing job classification, or the creation of a new class and associated pay.

3.6 **Equity Review** is the evaluation of pay based on compensable factors. This evaluation includes an external review to determine competitiveness with the prevailing levels of pay for substantially comparable work within a specified labor market area, as well as internal alignment within the established job family. Equity reviews, at the discretion of the General Manager, shall be conducted using benchmark classes for established job families based on a survey cycle established in the respective MOU. Requests for equity reviews outside of the survey cycle will be reviewed, and those approved by the General Manager shall be conducted on an EXCEPTION ONLY basis where it can be justified due to employee recruitment and/or retention problems or inequity between classes that a review outside the survey cycle is warranted.

4. **TRAINING**

4.1 Supervisors and other management personnel are to be trained in:

A. Their responsibility to ensure that employees perform work duties and responsibilities within the framework of the employee's assigned classification as described in the established classification specifications.

B. Understanding the process for requesting review of a position and/or classification, the necessary justification to be submitted, and the study/approval process.

5. **CLASSIFICATION PLAN MAINTENANCE**

5.1 **Plan Maintenance** - The Deputy General Manager and/or designee is responsible for maintenance of the Classification Plan, including the allocation of new or changed positions to the appropriate class, the determination of proper salary ranges within the provision of pay administration with the approval of any other body specified in the Municipal Code, maintenance of up-to-date class specifications, and the preparation of reports and recommendations on revisions to the Classification Plan.

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5.2 **Class Specifications** - The Human Resources staff, with the assistance of supervisors, managers, and Division Heads will develop and maintain ADA-compliant (Americans with Disabilities Act) written class specifications for each class.

5.3 **Content** - Class specifications shall include the class title, date established and/or revised, job code, exempt/non-exempt status under the FLSA (Fair Labor Standards Act), Unit Representation, a brief statement defining the essential duties and responsibilities of the class, the distinguishing characteristics of the class that differentiate it from other classes (if applicable), the supervision received and exercised, examples of duties performed, the typical working conditions (as applicable), the qualifications required in terms of knowledge, skills, and ability, the minimum qualifications in terms of experience and education, any necessary special requirements, physical tasks and environmental conditions, career ladder, and Testing Standards.

5.4 **Class Title** - Class titles specified in the Classification Plan shall be the official titles to identify positions in each class and for use on all official records. Official titles shall be gender neutral. Working titles for purposes not related to personnel administration may be used provided that such titles are not confused with or similar to other official class titles. Titles that require state licensing shall not be used by any employee unless they possess a current California license for that title.

5.5 **Qualifications** - Experience and education statements in each class specification establish requirements that must be met by all individuals competing for appointment or promotion to a position in a class.

5.6 **Interpretation** - Class specifications shall be considered as descriptive guidelines and not as inclusive of all duties and responsibilities to be found in positions allocated to a particular class. An employee may be required to perform other duties of a similar kind and quality but not listed in the class specification, as well as any duties of lower classes in the same occupational series, or in similar series which have similar characteristics.

5.7 **Allocation of New Positions** - No individual may be appointed, reappointed, reinstated, rehired, transferred, demoted, or promoted except to an established position. An established position is one that has been classified, has a class specification established, has a salary range assigned, and has been authorized by the General Manager and Water Board, and by any other body specified in the Municipal Code.

5.8 **Job description reviews** for benchmark and related classes will be conducted as part of benchmark survey cycle

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(refer to paragraphs 8.4 and 8.5), provided that the job description has not been reviewed in the ten (10) years prior to conducting the survey. Out of cycle job description reviews will be considered upon request and with the approval of the Division Director and General Manager.

6. TITLE PROTOCOLS

6.1 **Director** - is limited to classes of work primarily engaged in the formal management process, with policy and strategic planning at the Department level; with total responsibility for a major and distinct function, reporting directly to the General Manager or Deputy General Manager.

6.2 **Manager** - is limited to classes of work primarily engaged in the formal management process of a major area/division/department including the integration and harmonizing of diverse functions, and a combination of the areas of planning, executing, controlling, and evaluation of substantial human and financial resources. With the exception of classifications for which "manager" in the title is the industry standard, such as Construction Project Manager, must manage people including multiple supervisors, not just a process (direct and oversee the work of a division/section rather than engaged in that work).

6.3 **Principal** - is limited to classes of work primarily engaged in organizing, directing, evaluating, and providing personal leadership to a section or group of subordinate employees. Performs/does related work within the area of assignment; OR is a single contributor functioning as a subject matter expert.

6.4 **Superintendent** - is limited to classes of work primarily engaged in organizing, directing, evaluating, and providing personal leadership to a section or group of subordinate employees. Performs/does related work within the area of assignment.

6.5 **Supervisor** - is limited to classes of work primarily engaged in organizing, directing, evaluating, and providing personal leadership to a section or group of subordinate employees. Performs/does related work within the area of assignment.

6.6 **Lead** - is the advanced level in a job family, requiring additional knowledge or certifications within the discipline who participates, oversees, leads, directs, trains, guides, checks, monitors, inspects, assigns, and reports on the work of a crew or assigned staff.

6.7 **Senior** - is the advanced journey level in a job family, requiring additional knowledge or certifications within the discipline; performing the more complex duties and who may provide lead direction to a small group within the Department.

6.8 **Technician** - is limited to classes of work primarily engaged in duties requiring specialized knowledge of a technical

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discipline such as Engineering Technician.

6.9 **Coordinator** - is limited to classes of work primarily engaged in independently facilitating the communication process and/or activities between the parent and outside organizations.

6.10 **Specialist** - is limited to classes of work primarily engaged in duties of a non-technical nature, highly specific as to occupational specialization at the para-professional level, often within a subdivision of a broad field of work such as Maintenance Specialist.

6.11 **Other** - the Human Resources Manager shall recommend to the General Manager other titles as deemed appropriate to include entry level workers and assistants, as well as other specialized types not otherwise defined above.

7. **SALARY PLAN MAINTENANCE**

7.1 **Authority** - The Deputy General Manager and/or designee shall be responsible for maintenance of the Salary Plan and shall prepare all revisions to the Plan for approval by the General Manager and Water Board for the San Bernardino Municipal Water Department, and any other body specified in the Municipal Code.

7.2 **Pay Policy** - The San Bernardino Municipal Water Department's "Pay Policy" is to provide, within the limitations of financial ability and within any limitations of the meet and confer process, a) equal pay for substantially equal work performed under similar conditions, b) differences in pay based on compensable factors including recognizable differences in work performed, responsibilities assigned, experience, and qualifications required, and c) levels of pay that are competitive with the average of prevailing levels of pay for substantially comparable work within specified labor markets. Further, the compensation up to the 75th percentile of prevailing levels of pay for substantially comparable work within specified labor markets, depending on recruitment and retention needs and related considerations.

7.3 **Revisions to the Plan** - Revisions to the Plan may include adjustments to fringe benefits and salary ranges of a class or group of classes (job family) based on a) internal pay comparisons between job classes, b) prevailing rates of pay in the labor market, c) employee recruitment and/or retention problems, and d) negotiations with represented or non-represented employees.

7.4 **Benchmark System** - Under the direction of the General Manager, the Deputy General Manager, in conjunction with the Division Heads, shall establish a system of "Benchmark Classes" that represent easily identifiable job classes within each "series" or "job family" of associated job classifications (e.g.

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Benchmark - Water Reclamation Operator, related job classes, Water Reclamation Senior Operator, Water Reclamation Lead Operator, etc.) The General Manager retains the authority to change from a Benchmarking System if it is in the best interest of the organization to do so. The Deputy General Manager may determine other classes to survey that are not designated as Benchmarks, based on merit, justification, and/or need.

7.5 Survey Cycle - At the discretion of the General Manager, a Survey Cycle of the identified Benchmark Classes, representing all job families in the Classification Plan, will be established in the respective MOU to determine competitiveness in the labor market.

7.6 Conduct of Surveys - Surveys, when directed by the General Manager, shall be conducted solely by either Human Resources staff, or by an outside professional contracted by the Deputy General Manager. Surveys conducted by employee associations, International Brotherhood of Electrical Workers Local #47 (IBEW), employees, supervisors, managers, and division heads are discouraged.

7.7 Comparable Organizations - Surveys, when directed by the General Manager, shall be conducted utilizing a group of comparable organizations within a specified labor market. These organizations are determined by such factors including size of population served, geographical proximity, budget size, number of full-time employees, size/classification of plant for Water Reclamation (e.g., 4 or 5), services provided for Water, Reclamation (e.g., collection/ treatment), classification of distribution/treatment for Water (e.g., 05, T5), and labor market conditions. Exceptions to the group of comparable organizations will be made by the General Manager when determined necessary, based on factors such as the need to solicit data from a different labor market and/or insufficient comparables. The General Manager, or designee, retains the discretion to replace any one or all of these agencies, provided that the substitute organization(s) will be comparable.

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These organizations may include:

Agency	Water (Technical)	Wastewater Treatment (Technical)	Sewer Collection (Technical)	Office/Admin/ Maintenance	Executives and Executive Support Staff
City of Anaheim	✓		✓	✓	✓
City of Colton	✓	✓	✓	✓	
City of Corona	✓	✓	✓	✓	
City of Redlands	✓	✓	✓	✓	
City of Rialto		✓	✓	✓	
City of Riverside	✓	✓	✓	✓	✓
City of San Bernardino				✓	✓
Coachella Valley Water District	✓	✓	✓	✓	✓
Cucamonga Valley Water District	✓		✓	✓	✓
East Valley Water District	✓		✓	✓	✓
Eastern Municipal Water District	✓	✓	✓	✓	✓
Elsinore Valley Municipal Water District	✓			✓	✓
Inland Empire Utility Agency		✓		✓	✓
Monte Vista Water District	✓			✓	✓
Victor Valley Water Reclamation Authority		✓			
West Valley Water District	✓			✓	✓
Western Municipal Water District	✓			✓	✓
City of Ontario	✓		✓	✓	✓
City of Pomona	✓		✓	✓	✓

7.8 Comparability of Job Classes - A comparable position is determined when the job content meets 70% of the criteria as defined in San Bernardino Municipal Water Department's job description.

7.9 Survey Results - In order for a job family to be recommended for range adjustments, the benchmark classification must be at least 5% below the average maximum of the applicable survey agencies, and adjustments will be capped at 15%, unless otherwise approved by the General Manager. As a result of any final survey results, the General Manager may recommend adjustments in compensation to the Water Board and any other body specified in the Municipal Code, as appropriate. The Water Board, and/or any other body specified in the Municipal Code, always retains the right to accept/reject management's recommendations.

8. CLASSIFICATION/COMPENSATION STUDY REQUEST PROCESS

8.1 Categories - Requests for review of classification/

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compensation are submitted once annually in conjunction with the budget process and may include the following categories: a) reclassification of a position or group of positions within an established job classification, b) reorganization, c) establishment of a new position, and d) equity review of a classification.

8.2 Reclassification - This category includes requests for review of the classification of a position and/or group of positions within an established job classification based on an increased scope of responsibility, increased complexity of work, change in supervision received and/or exercised, or other compensable job factor. Changes in quality of work and quantity of work do not solely constitute a basis for a classification review. The "Classification Study Request Form" shall be submitted along with related documentation as identified in the form with emphasis on how the nature of work has changed and why.

8.3 Reorganization - This category is for the request to reorganize a division, section, or work group. The "Classification Study Request Form" shall be submitted along with related documentation as identified in the form with emphasis on the organizational efficiency and effectiveness to be achieved with the proposal and cost impact.

8.4 New Positions - Managers requesting a new position, either in an existing or new class, shall provide a "Classification Study Request Form" and related documentation as identified in the form and a "Draft Job Description" when the request is for a new class.

8.5 Equity Review - Generally, requests for equity review will not be addressed outside the established "Survey Cycle" as part of the "Benchmarking System" as defined in Section 8, Salary Plan Maintenance. Where a division head can justify the need to conduct an equity review, outside the established process, based on recruitment and/or retention issues or related issues, the General Manager may approve such study. The "Classification Study Request Form" shall be submitted along with related documentation as identified in the form with emphasis on the justification for exception to the established practice.

8.6 Preliminary Evaluation - The division head shall be responsible for the preliminary evaluation and/or justification of all division requests for review and shall forward approved requests, with comment and recommendation to the General Manager for consideration.

8.7 Approval/Denial of Study Request - The General Manager, and/or designee, shall review Classification Study Requests and approve/deny requests as appropriate based on justifications

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submitted. Those approved shall be studied by Human Resources staff and/or by an outside contracted professional. Studies shall include investigation and/or audit as necessary. Following review with the concerned division(s), recommendations shall be made by Human Resources staff and/or the outside contracted professional to the General Manager concerning the allocation of positions to appropriate classes as well as the results of equity reviews.

8.8 Timeline - Timelines for the study request process and survey cycle studies are as follows:

September 1 - 30 - Director or Division Manager to submit by the deadline a complete package of study requests for any of the defined categories in this policy with appropriate forms/documentation. Human Resources or contracted outside consultant begins job description reviews (job audits) of applicable benchmark and related classes.

October 1 - 15 - Director or Division Manager to present their requests to General Manager at a Management Team meeting to identify any related impacts of requests in one area on another. General Manager and/or designee to consider merits of study requests based on documentation submitted and verbal discussion, and to either approve or deny requests. Division Heads to be notified of approval or denial by October 31st.

November 1 - February 15 - Human Resources staff and/or outside contracted professional to conduct assessment, job audits, and evaluation of approved reclassification, reorganization, new position, and equity study requests, and conduct related salary surveys as necessary in order to make recommendations to the General Manager. Human Resources or contracted professional begins survey of scheduled benchmark classifications using published/available survey agency job descriptions and salary schedule information as of January 15.

February 16 - March 1 - Preliminary study results to be shared with Director or Division Manager in order to receive feedback and validation. Concerns are identified and resolved.

March 2 - March 15 - Results/notifications are provided to study participants.

March 16 to March 30 - Appeals identifying specific points of disagreement are submitted to the Deputy General Manager. Meetings with a committee consisting of the Deputy General Manager, Division Director, Association or IBEW Representative, and Human Resources Manager and affected employee are scheduled to discuss concerns identified in appeal. Final evaluation and recommendation are prepared by the Deputy General Manager, with assistance from outside contracted professional or Human

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Resources, as appropriate. Recommendations are prepared by Deputy General Manager, or designee, for General Manager approval. The General Manager renders decision and is the final authority. Cost impact is prepared for all recommendations.

May 1 - June 30 - Approved changes are included in budget for fiscal year July 1 adoption by the Water Board. Applicable new and revised job description are presented to the Water Board for consideration. The Water Board maintains final authority to approve/deny management's recommendations.

9. REALLOCATION OF POSITIONS

9.1 Classification Actions - Changes to a position that affect the original allocation and result in the reallocation of that position including a) title change, b) reclassification, and c) salary range change.

9.2 Title Change - A technical change to better identify a position or to reflect current occupational terminology. This change by itself does not require any change in qualifications, salary range, or status of the incumbent(s).

9.3 Reclassification - A reallocation of a position from one class to another class as a result of change in duties, responsibilities, and/or qualifications (experience, education) requirements. Reclassification may be upward, downward, or lateral.

9.4 Salary Range Change - A change affecting all positions in a class through an amendment to the Salary Plan, based upon a need to maintain internal equity among certain classes, or continuing difficulty in recruiting and retaining well qualified persons.

9.5 Notification - The Human Resources staff will notify all participants in a classification/compensation study with the results of the study upon final approval by the General Manager, Water Board, and/or any other body as specified in the Municipal Code.

10. APPEAL OF CLASSIFICATION/COMPENSATION STUDY RESULTS

10.1 An employee who does not agree with the results of a classification/compensation study may submit their concerns in writing to the Deputy General Manager as prescribed in the above timeline. Final evaluation and recommendation are prepared by the Deputy General Manager, with assistance from Human Resources or outside contracted professional, as appropriate. Recommendations are prepared by the Deputy General Manager for General Manager approval. The General Manager renders a decision. The General Manager, with approval of any other body specified in the Municipal Code, is the final authority. Cost

impact is prepared for all recommendations.

10.2

11. IMPLEMENTATION OF STUDY RESULTS

11.1 Upon Upward Reclassification -

- a. Salary - An employee in a position reclassified to a new or existing class with a higher maximum salary rate shall receive a 5% increase or be placed at the bottom of the new Range, whichever is greater, provided that the top of the new range is not exceeded.

An employee whose anniversary date falls on the effective date of the reclassification shall receive a 5% increase, the highest percentage increase required to place an employee in the same classification (and in the same study) at the bottom of the new range, or the approved merit increase, whichever is greater, provided that the top of the new range is not exceeded.

- b. Effective Date - Shall be the first working day of the first pay period following the date of Budget Adoption, Water Board approval, approval of any other body specified in the Municipal Code, or date defined in the staff report.

- c. Anniversary Date - The incumbent's anniversary date for the next merit increase shall be set one year from the effective date of the reclassification. A new probationary period is not required.

11.2 Upon Downward Reclassification -

- a. Salary - An employee in a position reclassified to a new or existing class with a lower maximum salary rate shall either 1) retain current salary rate if it is the same as a rate within the salary range of the new class; or 2) be reduced to the maximum rate of the salary range of the new class if current salary is greater than the maximum rate of the new salary range; or 3) be assigned a "y" rate designation that holds the incumbent at the current salary which is above the new range until such time as the salary rate of the new class is the same as or exceeds the amount of the "y" rate. Establishment of a "y" rate is an administrative determination and requires approval of the General Manager and Water Board, and any other body specified in the Municipal Code.

- b. Effective Date - Shall be the first working day of the first pay period following the date of Budget Adoption, Water Board approval, approval of any other body specified in the Municipal Code, or date defined in the staff report.
- c. Anniversary Date - There shall be no change in the incumbent's anniversary date as a result of downward reclassification. If applicable, future merit increases shall occur according to regular policy. A new probationary period is not required when the demotion is a convenience to the organization (e.g., reorganization).

11.3 Upon Lateral Reclassification -

- a. Salary - An employee in a position reclassified to a class with a salary range having the same maximum salary rate, the effect of this action shall be no change to salary.
- b. Effective Date - Shall be the first working day of the first pay period following the date of Budget Adoption, Water Board approval, approval of any other body specified in the Municipal Code, or date defined in the staff report.
- c. Anniversary Date - The incumbent's anniversary date shall not change. A new probationary period is not required.

12.4 Equity Study Results

- a. Salary - An employee in a position that is determined to receive a salary adjustment as the result of an equity study who has a current hourly rate that falls within the new Range shall receive a 5% increase, or the highest percentage increase required to place an employee in the same classification (and in the same study) at the bottom of the new Range, whichever is greater, provided that the top of the new Range is not exceeded. An employee with a current hourly rate that is lower than the new Range will be placed at the bottom of the new Range.

Example 1: The salary Range for a classification is being adjusted to a new Range with a minimum hourly rate of \$23 and a maximum hourly rate of \$35. An employee with an hourly rate of \$20 would require a 15% increase to be placed at the bottom of the new Range. Another employee in the same classification with a current hourly rate of \$21 would receive approximately a 10% increase to be placed at the bottom of the new Range; an employee in the same

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classification who is already at an hourly rate of \$23, and therefore, within the new Range, would receive a 15% increase, provided that the top of the new Range is not exceeded.

Example 2: The salary range for a classification is being adjusted to a new salary Range with a minimum hourly rate of \$23 and a maximum hourly rate of \$35. An employee with an hourly rate of \$22.10 would require approximately a 4% increase to be placed at the bottom of the new Range. No other employees in the same classification would need more than a 4% increase to get into the new Range. These employees would be placed at the bottom of the new Range. An employee with a current hourly rate of \$24, which falls within the new Range, would receive a 5% increase, provided that the top of the new Range is not exceeded.

- b. Effective Date - Shall be the first working day of the first pay period following the date of Budget Adoption, Water Board approval, approval of any other body specified in the Municipal Code, or date defined in the staff report.
- c. Anniversary Date - The incumbent's anniversary date for the next merit increase shall be set one year from the effective date of the equity adjustment when the increase is greater than 5%. When the increase is 5% or less, the incumbent shall retain the same anniversary date. A new probationary period is not required.

Policy Review

Established:	3/1/2005
Revised:	4/24/2006
Revised:	6/24/2016
Revision 7/1/18 Board approved:	6/26/2018
Revision 7/1/19 Board approved:	6/11/2019
Revision Board approved:	8/25/2020
Revision 7/1/21 Board approved:	6/22/2021
Revised, administrative corrections/changes:	12/9/2021
Minor changes GM approved:	7/2022
Revision 7/1/23 Board approved:	6/27/2023
No changes:	7/2023
No changes:	7/2024

	SAN BERNARDINO MUNICIPAL WATER DEPARTMENT CLASSIFICATION STUDY REQUEST FORM		
DATE OF REQUEST: 			
REQUESTED BY: ☐ Division Director/Supervisor ☐ Employee			
REQUEST TYPE: ☐ Reclassification ☐ Reorganization ☐ New Position ☐ Equity Study ☐ Single Position ☐ Division ☐ New Classification ☐ Multiple Positions ☐ Section ☐ Existing Classification ☐ In Same Classification ☐ Work Group			
JOB TITLE(S)/INCUMBENT(S) INCLUDED IN STUDY (attach additional sheets if necessary)			
Name(s):		Division:	
Current Classification:		Proposed Classification:	
Current Salary Range:		Proposed Salary Range:	
JUSTIFICATION (be as specific as possible; attach additional sheets if necessary)			
FISCAL IMPACT OF REQUESTED CHANGES:			

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☐ Organizational charts, current and proposed, are attached identifying all impacted positions/incumbents by their current and proposed job titles.

SIGNATURES AND RECOMMENDATIONS:			
Employee (Only required if request initiated by employee)			
Signature:		Phone #:	Date:

Supervisor/Manager			
Signature:		Phone #:	Date:
Recommendation:	☐ Approve	☐ Deny	
Reason:			

Division Director:			
Signature:		Phone #:	Date:
Recommendation:	☐ Approve	☐ Deny	
Reason:			

Once above signatures/recommendations are completed, forward form to Human Resources

General Manager:			
☐ Approve	☐ Deny	Signature:	Date:
Reason for Denial:			

Human Resources:	
Completed By:	Date:
Recommendation:	
Date of Water Board Approval:	

INSTRUCTIONS/DEFINITIONS FOR CLASSIFICATION STUDY REQUEST FORM

Reclassification: The reallocation of a single position, or multiple positions in one classification to a different classification as a result of a significant change in the duties, responsibilities, and/or qualification requirements of the position as a result of an identifiable and/or quantifiable cause. Title changes are included in this category.

Factors that may be justification to request a reclassification study:

- o Significant changes in assigned responsibilities
- o Changes in the level of complexity of assignments/responsibilities
- o Changes in the organizational impact of the position
- o Changes in the level of supervision received and/or exercised
- o Changes in the knowledge, skills, abilities, and/or license/certificate required to successfully perform in the position

Factors generally not considered for a reclassification study request:

- o Incumbent performance
- o Longevity
- o Change in the volume/quantity of work
- o Personality
- o Financial need

The reason for reclassification should include how and why the duties/responsibilities of the position(s) have changed and, if applicable, what position/classification performed these duties previously; what differentiates the requested position(s) from the current position(s) in terms of scope of responsibility, technical expertise, decision making, leadership, supervisory responsibility, etc.; how the reclassification will improve effectiveness and/or efficiency; and if you are aware of any impact reclassification of the position(s) will have on other classifications/positions in the Department.

Requests for new classifications should include a draft job description.

Reorganization: A change of structure within a section, division, or work group involving multiple positions that will enhance the efficiency and effectiveness of the Department as it relates to goals and/or services provided.

Equity: Generally, requests for equity studies will not be addressed outside the established "Survey Cycle" as defined in the policy. Where a Division Director can justify the need to conduct an equity study outside the established process based on recruitment and/or retention, or related issues, the General Manager may approve such study.

Note: For study requests denied at the supervisor/manager or Division Director level, provide a copy to Human Resources, and if the study was requested by the employee, also provide a copy to the employee.

Contact Human Resources at (909)453-6090 if you have any questions regarding completion of this form.