



# County of Imperial

Employee Orientation Sessions  
Merit Systems Services Classifications  
Social Services and Child Support  
Departments

August, 2024



# About Gallagher (Formerly known as Koff & Associates)

- Koff and Associates Founded in 1984
- As of April 30, 2021, Koff & Associates merged with Arthur J. Gallagher and are now officially a Gallagher Division.
- Provides premier public sector human resources services:
  - I. Classification and Job Analysis
  - II. Compensation and Plan Development
  - III. Organizational Effectiveness
  - IV. Recruitment Services
- Partner with:
  - I. Cities, Counties, Special Districts, and Others
- Straightforward, interactive, all-inclusive methodology



Category	Value	Value
Category 1	Value 1	Value 2
Category 2	Value 3	Value 4
Category 3	Value 5	Value 6
Category 4	Value 7	Value 8

# Classification Study Overview



**Gallagher**

Insurance | Risk Management | Consulting

## Why We Are Here

### Classification and Total Compensation Study

- Classification Analysis and Plan Development
- Classification and Compensation Relationship
- Snapshot in time
- Organizational changes

### Stakeholder Involvement

- Employees
- Management
- Human Resources
- California Department of Human Resources (CalHR)
- Board of Supervisors

## Purpose of a Classification Study

- Up-to-date and current classification plan/descriptions
- Ensure legal compliance
  - Fair Labor Standards Act and Americans with Disabilities Act
- Enhance recruitment process, DEI focus
- Career paths
- Training opportunities
- Objective performance evaluations
- Equitable compensation system

## Merit Systems Services – CalHR

1. CalHR manages the Merit Systems program and have final authority over any and all classification recommendations put forth in the study
2. They have formally approved the use of the documentation and have advised the County and Gallagher on the process, roles and responsibilities for the project
3. The County and Gallagher will work collaboratively with CalHR to provide them with the documentation needed for the study and to respond to questions and issues with respect to the recommendations prepared by Gallagher

## Key Classification Principles

Classify the position, not the employee

Determining the classification of a position should be consistent, irrespective of who is in the position



Classification does not consider the capabilities of individual employees or the efficiency and effectiveness of incumbents



It is not used to reward performance or length of service

## Key Classification Principles



Classification is not used to:

Retain a specific employee  
Enhance compensation



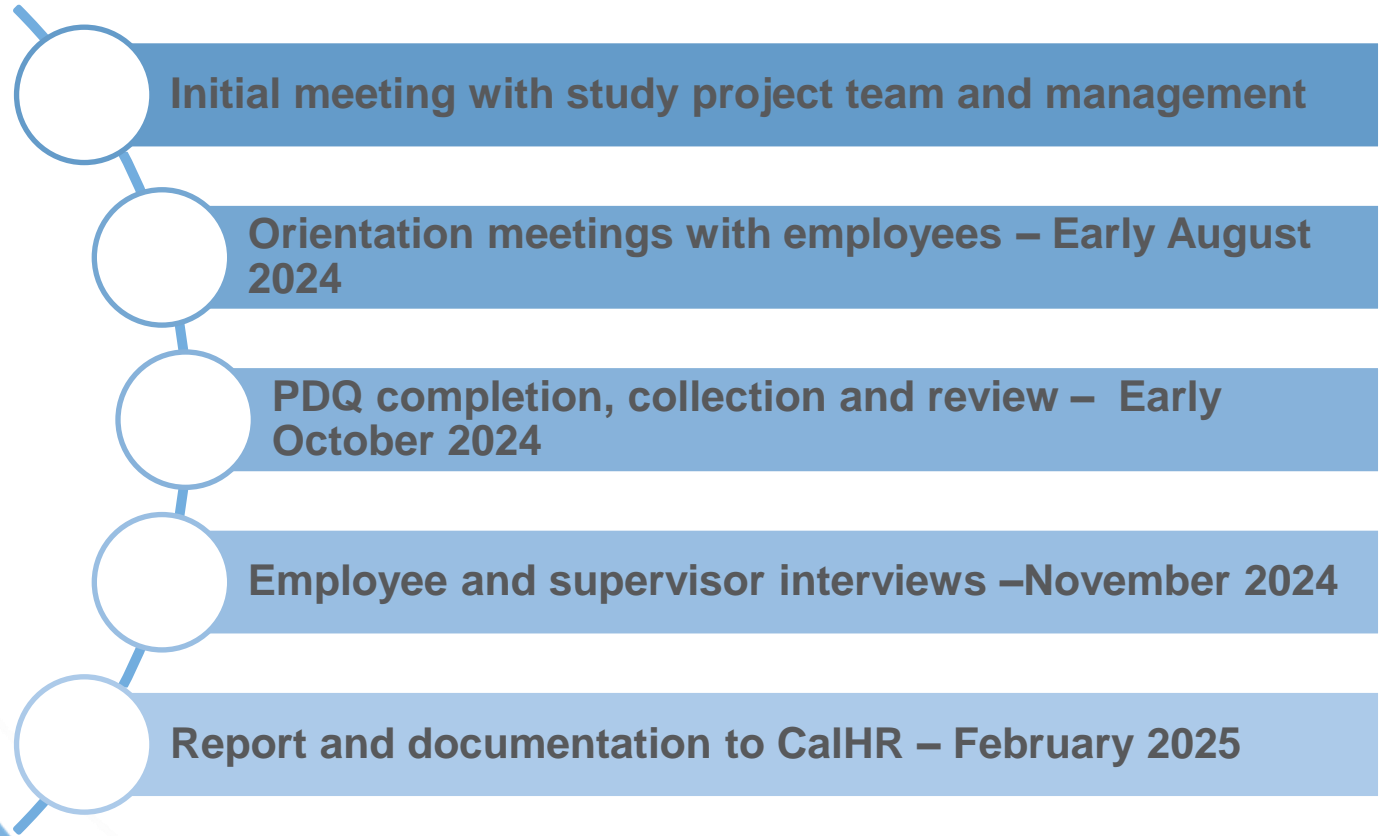
Classification is not impacted by:

Work volume  
Good performance  
Working out of class situations



## Classification Study Methodology/Process and Timelines\*

\*Proposed timelines with approximate dates;  
study success is dependent on staff participation.



Insurance | Risk Management | Consulting



# Total Compensation Study



**Gallagher**

Insurance | Risk Management | Consulting



**Comparator  
agencies**



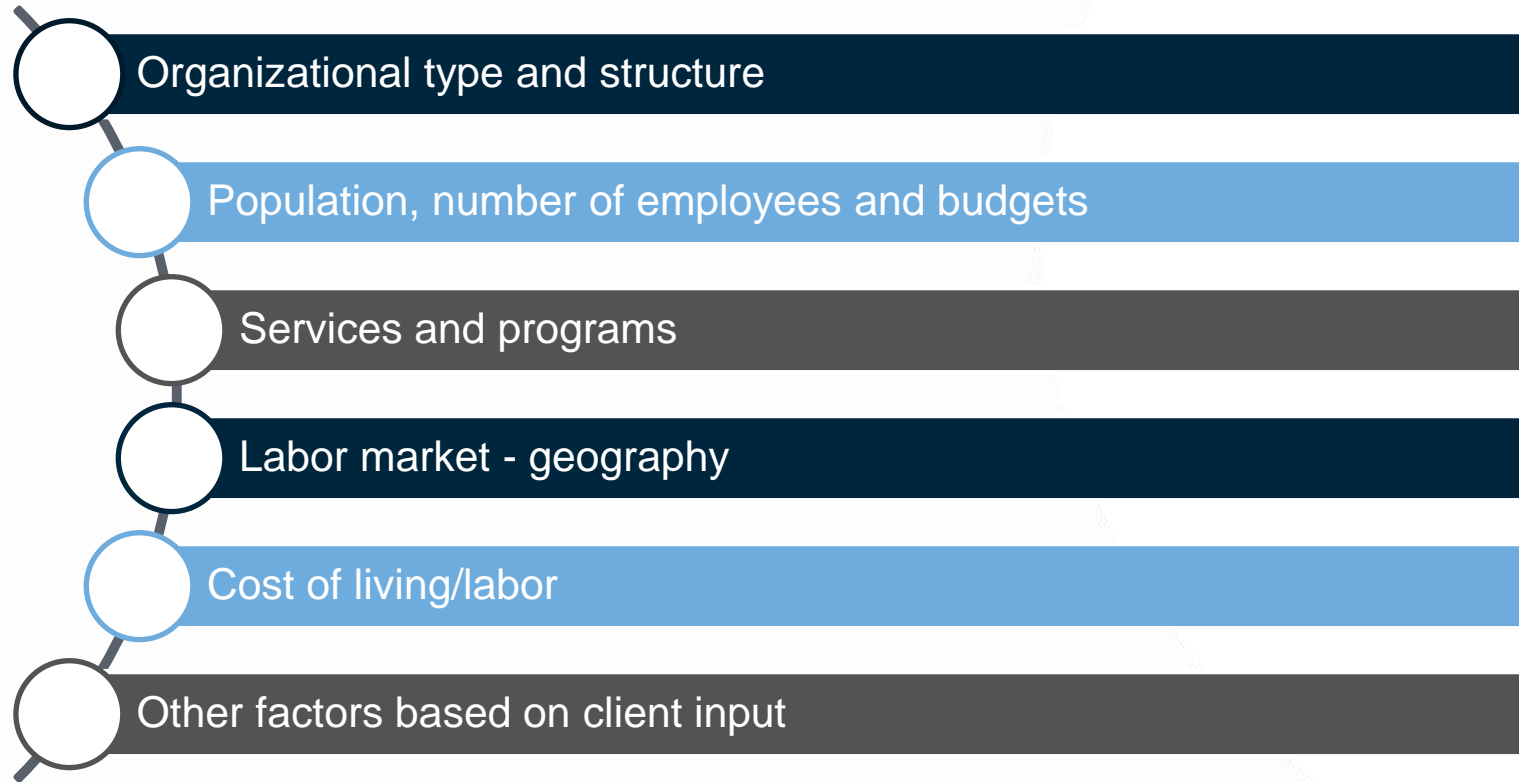
**Benchmark  
classifications**



**Benefits  
elements**

# Compensation Study Elements

# Comparator Agency Criteria



Each factor analyzed, ranked, scored

Total score determines level of similarity

# Benchmark Classes

County classes which we anticipate would be common to other agencies

- Not every class is a benchmark
- Should have a relationship to other County classes
- Benchmark classes are used to set salaries for non benchmark classes

# Benefits Data

## Retirement and annuities

Includes retirement, social security, deferred compensation, defined contribution

## Insurances

Flexible benefit and/or health, dental, vision

## Leaves

Holidays, vacation, administrative/personal

## Other

Selection of five additional benefits or premium pays



Insurance | Risk Management | Consulting

© 2023 ARTHUR J. GALLAGHER & CO.

# Highly Customized Survey

- Job/class descriptions
- MOUs
- Organizational charts
- Salary information/benefits summaries
- Description-to-description
- 70% match
- Comprehensive audit of data by Project Manager

All analyses completed in-house

No questionnaires

## Project Timeline and Deliverables

### Timeline

Classification Study August 2024 – February 2025 (Gallagher)

- CalHR TBD Compensation Study September, 2024 – June 2025

### Classification:

- Report and recommendations to CalHR for their action

### Compensation:

- Implementation plan; multi-year, if needed





## PDQ Completion



**Gallagher**

Insurance | Risk Management | Consulting

© 2023 ARTHUR J. GALLAGHER & CO.

Not a performance evaluation process

Not a staffing study

PDQs – no changes by supervisor

PDQs – completed during normal work hours

## Study Expectations

# Proposed Project Timeline



## PDQ Completion: Section 1.0

### Purpose

- Brief summary of duties
- 2-3 sentences
- Overall purpose of the position
- Example: Information Systems Analyst II
  - Performs professional information technology work in the design, development, programming, testing, implementation, modification, and maintenance of computer programs and applications across multiple platforms and technologies.

**POSITION DESCRIPTION QUESTIONNAIRE**

Name: <input type="text"/>	Class Title: <input type="text"/>	
Department: <input type="text"/>	Division: <input type="text"/>	
Work Address: <input type="text"/>		
Work Phone: <input type="text"/>	E-mail Address: <input type="text"/>	
Work Shift: <input type="text"/>	Time in Current Job: <input type="text"/>	Time with the Agency: <input type="text"/>

Each employee will have the opportunity to be interviewed by Gallagher. Employees in a classification with only one position will be interviewed by the consultant. Please select one of the following options:

- I am interested in participating in a group interview for my classification.
- I am interested in participating in an individual interview.
- I do not request an interview. Please note if you check this box, the consultant may still elect to interview you.

The individual interviews will be no more than 30 minutes; group interviews will be no more than 45 minutes.

**1.0 PURPOSE:** Briefly summarize the overall purpose of your position:

## 2.0 Supervision Received

### 2.0 ORGANIZATIONAL CONTEXT: SUPERVISION RECEIVED

2.1 I report to:  (Name of immediate Supervisor)  
 (Title of immediate Supervisor)  
 (E-mail Address of immediate Supervisor)

Others who report to the same supervisor:

Job Title	Name
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

2.2 How are your work priorities set (by you, by your supervisor, standard procedures, etc.)?

2.3 Describe the work decisions that you make on your own:

2.4 Which decisions do you refer to your supervisor, or to other departments within the organization?

2.5 What types of guidance are used to aid you in the performance of your duties (desk manuals, departmental procedures, established practices, regulations, etc.)?

2.6 How frequently do you meet with your supervisor to receive work direction and/or to have your work checked (daily, weekly, monthly, rarely, as needed, etc.)?

# 3.0 Supervision Exercised

## 3.0 ORGANIZATIONAL CONTEXT: SUPERVISION EXERCISED

3.1 Does your position supervise other employees? (If no, skip the remainder of Section 3.)

Yes  No

3.2 Name and title of employees that you directly supervise:

<i>Job Title</i>	<i>Name</i>

3.3 What type/level of supervision do you exercise? Check all which apply:

Approve	Recommend	
<input type="checkbox"/>	<input type="checkbox"/>	Plan work of others
<input type="checkbox"/>	<input type="checkbox"/>	Distribute work to others
<input type="checkbox"/>	<input type="checkbox"/>	Check work of others
<input type="checkbox"/>	<input type="checkbox"/>	Approve work of others
<input type="checkbox"/>	<input type="checkbox"/>	Train employees
<input type="checkbox"/>	<input type="checkbox"/>	Evaluate performance
<input type="checkbox"/>	<input type="checkbox"/>	Establish unit policy/procedure
<input type="checkbox"/>	<input type="checkbox"/>	Other - Please list: <input style="width: 50px;" type="text"/>

Approve	Recommend	
<input type="checkbox"/>	<input type="checkbox"/>	Hire new employees
<input type="checkbox"/>	<input type="checkbox"/>	Terminate employees
<input type="checkbox"/>	<input type="checkbox"/>	Promote employees
<input type="checkbox"/>	<input type="checkbox"/>	Demote employees
<input type="checkbox"/>	<input type="checkbox"/>	Discipline employees
<input type="checkbox"/>	<input type="checkbox"/>	Approve leave
<input type="checkbox"/>	<input type="checkbox"/>	Approve pay increases
<input type="checkbox"/>	<input type="checkbox"/>	Other - Please list: <input style="width: 50px;" type="text"/>

# 4.0 Equipment

**4.0 EQUIPMENT:** List any machines, equipment, or vehicles you regularly operate in the course of work (e.g., office equipment such as computer, copy machine, etc.; hand and/or power tools; vehicles such as trucks, forklifts, cars, etc.; heavy equipment such as loader, cranes, bulldozers, crane lifts, etc.)

Type of Machinery/Equipment	Purpose for Which You Use It	What You do With It



# 5.0 Contacts

**5.0 CONTACTS:** Other than your supervisor and coworkers, with whom, inside and outside of the agency, do you have contact in the course of your work, and how frequently? (*D=daily, W=weekly, M=monthly, I=infrequently: several times a year or less*)

Title	Regarding	Frequency
		Select
		Select
		Select
		Select
		Select
		Select
		Select
		Select
		Select
		Select

## 6.0 Budget

**6.0 BUDGET:** Total dollar amount of budget under your control:

**6.1** Describe your responsibility for budget expenditures and control over revenue generation or cost savings:

## 7.0 Work/Duties

**7.0 DESCRIPTION OF YOUR WORK/DUTIES:** Describe on the following page(s) the work that you perform, starting with your most important duties. (See examples below) – Please focus on the most essential functions of your job and note that most class descriptions consist of 12-15 duty statements.

- First number your duties in the **#** column.
- In the **DUTIES** column, describe the tasks you perform beginning each statement with an action verb.
- In the **TIME** column, indicate what percentage of your overall work time you spend performing each duty. If percentages are too difficult, use hours per day, week, or month; or, for seasonal duties, show number of days or weeks per year.
- In the **FREQ** column, indicate how frequently the task occurs using the following codes:
  - SD=several times daily*
  - D=daily*
  - W=weekly*
  - M=monthly*
  - I=infrequently: several times a year or less.*
- In the **IMP** column, identify how important the duty is to your overall job effectiveness, using the following codes:
  - H = High: if this duty were removed from my job, it would have a significant impact on the nature of my job.*
  - M = Medium: if this duty were removed from my job, it would have an impact, but it would not change the nature of **my job significantly**.*
  - L = Low: if this duty were removed from my job, it would not have much impact.*

# 7.0 Work/Duties

#	DUTIES	TIME (Needs to add up to 100%)	FREQ	IMP
E.g., 1	I schedule and coordinate meetings, seminars, conferences, and training sessions for department staff; act as meeting and/or committee secretary including preparing agendas and informational packets, setting up meeting rooms, and taking and transcribing minutes for assigned boards and commissions.	15%	SD	H
E.g., 2	I monitor and control the operation of water distribution systems including chemical feeding equipment and utilizing the telemetry system, filtration equipment, reservoirs, and/or storage tanks.	25%	SD	H
E.g., 3	I write or review mitigation contract documents [plans and specifications] for site preparation, clearing and grubbing, earthwork, plant installation, erosion control, maintenance, and short-term monitoring.	30%	W	M
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select
			Select	Select

## 8.0 Complex Duties

## 9.0 Position Changes

**8.0 Which of your duties do you consider most complex or difficult, and why?**

**9.0 If your position responsibilities have changed significantly in the past two years, please explain how:**

# 10.0 Sensory Demands

**10.0 SENSORY DEMANDS:** Indicate which sensory abilities are required in the performance of your job, and in the **FREQ** column, show how often you use the sensory ability in the course of your work. Use these codes:

**SD**=several times daily; **D**=daily; **W**=weekly; **M**=monthly; **I**=infrequently: (several times a year or less)

Required (Yes / No)	Sensory Demand	FREQ
Select	SIGHT in order to <input type="text"/>	Select
Select	COLOR VISION in order to <input type="text"/>	Select
Select	HEARING in order to <input type="text"/>	Select
Select	SMELL in order to <input type="text"/>	Select
Select	SPEECH in order to <input type="text"/>	Select
Select	TOUCH in order to <input type="text"/>	Select

# 11.0 Physical Demands

**11.0 PHYSICAL DEMANDS:** Indicate which physical abilities are required in the performance of your job, and in the **FREQ** column, show how often you perform the physical activity in the course of your work. Use these codes:

**SD**=several times daily; **D**=daily; **W**=weekly; **M**=monthly; **I**=infrequently (several times a year or less)

Required (Yes / No)	Physical Demands	FREQ
Select	SITTING in order to <input type="text"/>	Select
Select	STANDING in order to <input type="text"/>	Select
Select	WALKING in order to <input type="text"/>	Select
Select	RUNNING in order to <input type="text"/>	Select
Select	CLIMBING in order to <input type="text"/>	Select
Select	BENDING in order to <input type="text"/>	Select
Select	STOOPING in order to <input type="text"/>	Select
Select	KNEELING in order to <input type="text"/>	Select
Select	HAND/FINGER MOVEMENT: GRASPING in order to <input type="text"/>	Select
	FINE MANIPULATION in order to <input type="text"/>	Select
Select	LIFTING in order to <input type="text"/> Avg # lbs: <input type="text"/> Max # lbs: <input type="text"/>	Select
Select	CARRYING in order to <input type="text"/> Avg # lbs: <input type="text"/> Max # lbs: <input type="text"/> Avg dist: <input type="text"/> ft. Max dist: <input type="text"/> ft.	Select
Select	PUSHING in order to <input type="text"/> Avg # lbs: <input type="text"/> Max # lbs: <input type="text"/> Avg dist: <input type="text"/> ft. Max dist: <input type="text"/> ft.	Select
Select	UNUSUAL FATIGUE FACTORS (e.g., wearing heavy protective clothing)	Select
Select	OTHER physical demands (list and explain): <input type="text"/>	Select

# 12.0 Environmental Conditions

**12.0 ENVIRONMENTAL CONDITIONS:** Indicate which conditions are required in the performance of your job, and in the **FREQ** column, show how often you work in the environmental condition. Use these codes:

**SD**=several times daily; **D**=daily; **W**=weekly; **M**=monthly; **I**=infrequently (several times a year or less)

Required (Yes / No)	Environmental Condition	FREQ
Select	Typical office conditions: <input type="checkbox"/>	Select
Select	Work outdoors: <input type="checkbox"/>	Select
Select	Exposure to extreme temperatures: <input type="checkbox"/>	Select
Select	Exposure to extreme weather conditions: <input type="checkbox"/>	Select
Select	Exposure to toxic/poisonous substances: <input type="checkbox"/>	Select
Select	Exposure to biologic/infectious agents: <input type="checkbox"/>	Select
Select	Exposure to dust, fumes, and/or allergens: <input type="checkbox"/>	Select
Select	Exposure to excessive noise: <input type="checkbox"/>	Select
Select	Exposure to unpleasant odors: <input type="checkbox"/>	Select
Select	Exposure to vermin, insects, parasites etc.: <input type="checkbox"/>	Select
Select	Work near hazardous/moving equipment or machinery: <input type="checkbox"/>	Select
Select	Work at heights: <input type="checkbox"/>	Select
Select	Work in a confining space (e.g., storage tank/vat, sewer, manhole, tunnel, pipeline, pit, duct, well, vault, trench) please list if applicable: <input type="checkbox"/>  If you work in a confining space, do you receive special training/certification to perform confined space entry? <input type="checkbox"/> Yes <input type="checkbox"/> No	Select
Select	Use protective clothing, equipment, devices, materials: <input type="checkbox"/>	Select
Select	Work with hostile, violent and/or offensive individuals: <input type="checkbox"/>	Select
Select	Other environmental conditions (list and explain): <input type="checkbox"/>	Select



# 13.0 Education

## 13.0 EDUCATION

13.1 What level of education do you have and what minimum level of education do you believe is needed to satisfactorily perform your job at the time of hire? Mark the level that applies to your job:

You Have	Minimum Required	Required (Yes/No)
<input type="checkbox"/>	<input type="checkbox"/>	Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
<input type="checkbox"/>	<input type="checkbox"/>	High School Diploma or equivalent (G.E.D.)
<input type="checkbox"/>	<input type="checkbox"/>	Up to one year of specialized or technical training beyond high school
<input type="checkbox"/>	<input type="checkbox"/>	Associate degree or two-year technical certificate - Type: <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Bachelor's degree - Type: <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Master's degree - Type: <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Other (explain): <input type="text"/>

13.2 What are the minimum years of experience that you believe is needed to satisfactorily perform your job at the time of hire?

13.3 List below the licenses, professional or technical certificates you currently hold and check the corresponding box if it is a minimum requirement of the position.

Certificate – Licenses	You Have	Minimum Required
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

# 14.0 Job Qualifications

**14.0 OTHER JOB QUALIFICATIONS:** Please add any other information you feel relevant to the study.

**14.1** List the types of **KNOWLEDGE (K)** and **ABILITIES (A)** needed to start on this job:

#	Knowledge & Abilities
K	Example: When listing laws, please specify its name such as National Environmental Policy Act (NEPA) or California Environmental Quality Act (CEQA).  DO NOT state, "pertinent federal, state, and local laws"
K	Example: Administrative principles and practices, including goal setting, program development, implementation, and evaluation, and supervision of staff.
A	Example: Develop and recommend environmental mitigation for projects.
A	Example: Conduct complex civil engineering research projects, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
Select	
Select	
Select	
Select	
Select	
Select	
Select	
Select	

# 15.0 Study Expectations

**15.0 STUDY EXPECTATIONS:** What are your expectations from this study?



*I understand that by checking this box, my electronic signature below certifies that statements made by me on this questionnaire are, to the best of my knowledge, complete and accurate.*

SIGNATURE:



DATE:



# PDQ Completion: Last Page

- Supervisor/Management Review
- Not a performance evaluation
- No content changes, comments only



Insurance | Risk Management | Consulting

# Supervisor Comments

## IMMEDIATE SUPERVISOR'S COMMENTS

Instructions: Review the employee's questionnaire carefully to see that it is accurate and complete. Do not change or alter the employee's statements or entries in the questionnaire. If you feel that the employee's description is not accurate, use the spaces provided below to clarify or elaborate on the description. Do not make any statements or comments about the employee's work performance or competence.

How long have you supervised this employee?

Which of the employee's duties do you consider most important or difficult?

If you had to replace the employee, what qualifications would be most important to you? What would the minimum educational and experience requirements be?

Do you agree with the employee's description of his/her work job and its requirements?

Use this space to add information or clarification to the employee's questionnaire.

***I understand that by checking this box, my electronic signature below certifies that, with the exception as noted above (if applicable) and to the best of my knowledge, the employee's questionnaire is an accurate and complete representation of his/her work.***

SIGNATURE:

DATE:

Print name and title:

# Manager Comments

## DEPARTMENT MANAGER'S COMMENTS

Which of the employee's duties do you consider most important or difficult?

Use this space to add information or clarification to the questionnaire, or other pertinent information.

***I understand that by checking this box, my electronic signature below certifies that, with the exception as noted above (if applicable) and to the best of my knowledge, the employee's questionnaire is an accurate and complete representation of his/her work.***

SIGNATURE:

DATE:

Print name and title:



Questions & Comments  
Thank You!



**Gallagher**

Insurance | Risk Management | Consulting