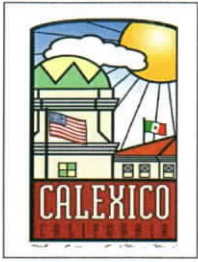


AGENDA
ITEM

10



AGENDA STAFF REPORT

DATE: March 15, 2023

TO: Mayor and Council Members

APPROVED BY: Esperanza Colio-Warren, City Manager *Esperanza Colio-Warren*

REVIEWED BY: Sandy Fonseca, Interim Finance Director

PREPARED BY: Denise Garcia HR/RM Manager *Denise Garcia*

SUBJECT: Approve the Reclassification of One Office Assistant Employee to a Permit Technician Effective Retroactively to July 1, 2022

=====

Recommendation:

Approve the reclassification of one Office Assistant employee to a Permit Technician effective retroactively to July 1, 2022.

Background:

The employee currently filling the Office Assistant position submitted a job analysis requesting to be reclassified to a Permit Technician. The job analysis is then reviewed by the Human Resources Department, per the City's Reclassification Policy, adopted in 2001. The Policy provides uniform standards for the proper submission, review, documentation of the validity of reclassification procedures, and is intended to be consistent with generally accepted professional standards as is necessary to assure the establishment of associated job-related and content-valid selection procedures.

Discussion & Analysis:

CURRENT CLASSIFICATION – Office Assistant

The Office Assistant position is a clerical position under the direction of the Planning & Building Director. Employees in this classification are required to have the ability to perform routine clerical duties such as filing, typing, duplicating and maintaining routine records, answer telephones and greet the public courteously. Minimal education of a high school diploma and sufficient training and/or experience demonstrating the knowledge and abilities to perform those duties is required for incumbents in this classification. There are currently no budgeted positions in this classification.

AGENDA ITEM 10

PROPOSED RECLASSIFICATION – Permit Technician

The Permit Technician position performs a variety of activities in support of the Planning Department operations. Incumbents in this classification are required to receive, process and distribute plan checks, building permits and other related documents as well as the ability and knowledge to provide building, zoning permit, plan check and general information to contractors, developers, outside agencies, and the public. They must also have the ability to review and interpret blueprints and building plans for compliance with codes and regulations. Graduation from high school and a minimum of three years of clerical experience involving frequent public contact is required. There is currently one budgeted position in this classification and one vacancy.

Over a course of eighteen months, the employee's current responsibilities as Office Assistant have merged and aligned with the responsibilities for that of a Permit Technician. The employee has assumed the role of a Permit Technician and has received no compensation for the additional duties in the past twelve months.

In relation to past job performance, a review of past performance evaluations indicates that the employee has had no deficiencies in their role as Office Assistant and has met or exceeded all performance targets during their employment in that classification.

After reviewing the job analysis, discussion with the department head, and reviewing the employee's personnel file, it is my recommendation that the Office Assistant employee be reclassified to the vacant Permit Technician position. The City Manager supports, approves, and has provided direction to bring the reclassification request before Council for approval to be accepted and effective retroactively to July 1, 2022.

Fiscal Impact:

No fiscal impact.

Coordinated With:

Planning & Building Director.

Attachments:

1. Permit Technician Job Description (proposed).
2. Office Assistant Job Description (current).
3. Reclassification Policy/



CITY OF CALEXICO

CLASS TITLE: PERMIT TECHNICIAN

MONTHLY: \$3,065 - \$3,725

RANGE: G-21

BASIC FUNCTION:

Under the direction of the Planning Manager, perform a variety of activities in support of Planning Department operations including the receipt, processing and distribution of plan checks, building permits and other documents; answer telephone calls, greet visitors and provide assistance concerning plan checks, permits and Department operations.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Perform a variety of activities in support of Planning Department operations; receive, process and distribute plan checks; receive plans, information and collect fees for review and building permit approval; review documents for accuracy, completeness and conformance to established procedures.

Answer telephones and greet visitors; provide building, zoning permit, plan check and general information to contractors, developers, other departments, outside agencies and the public; direct calls and visitors to appropriate departments and individuals; resolve issues and concerns.

Perform a variety of general clerical and secretarial support duties; prepare and type letters, lists, memoranda, purchase orders, agenda items, agreements and other correspondence from oral and verbal instructions; duplicate materials; schedule appointments.

Process and issue building permits for various construction projects; calculate and collect impact fees and building fees.

Compile and tabulate statistical data; maintain a variety of departmental records and files related to permits, fees, agreements, construction, staff and assigned activities; prepare a variety of reports for State agencies as directed.

Review and interpret blueprints and building plans for compliance with codes and regulations.

Communicate with other departments, outside agencies and the public to exchange information and resolve issues or concerns.

Operate a variety of office equipment including a copier, fax machine, calculator, computer and

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Ewing Consulting Services

assigned software.

Route and assign plan check numbers to permits and plan checks; issue building addresses for new subdivisions and commercial properties on newly developed land as directed.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Telephone techniques and etiquette.
- Operation of a computer and assigned software.
- Financial and statistical record-keeping techniques.
- Oral and written communication skills.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.
- Report preparation techniques.
- Basic math.

ABILITY TO:

- Perform a variety of activities in support of Planning Department operations including the receipt, processing and distribution of plan checks, building permits and other documents.
- Learn operations, procedures, specific rules and precedents of the office.
- Learn planning, zoning and building general requirements.
- Maintain financial and statistical records.
- Add, subtract, multiply and divide quickly and accurately.
- Answer telephones and greet the public courteously.
- Prepare reports related to assigned activities.
- Type or input data at an acceptable rate of speed.
- Operate a variety of office equipment including a computer and assigned software.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: graduation from high school and three years clerical experience involving frequent public contact.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

Constant interruptions.

PHYSICAL DEMANDS:

Hearing and speaking to exchange information in person or on the telephone.

Dexterity of hands and fingers to operate a computer keyboard.

Seeing to read a variety of materials.

Sitting or standing for extended periods of time.

Reaching overhead, above the shoulders and horizontally to file materials.

Bending at the waist, kneeling or crouching to file materials.



CITY OF CALEXICO

CLASS TITLE: OFFICE ASSISTANT

MONTHLY: \$2,687– \$3,479

RANGE: 23GX-15

BASIC FUNCTION:

Under the direction of an assigned supervisor, perform a variety of general clerical duties in support of an assigned department or program; answer phones and greet and assist the public.

REPRESENTATIVE DUTIES:

ESSENTIAL DUTIES:

Perform a variety of general clerical duties in support of an assigned office including typing, filing, duplicating and distributing materials.

Serve as receptionist; answer telephone calls and direct calls to appropriate personnel; take and relay messages; schedule department or program appointments, events and activities as required.

Receive, greet and direct visitors; respond to inquiries and provide a variety of general information and assistance to the general public related to department or program operations.

Type letters, forms, memoranda, bulletins, reports, notices, flyers, billings, requisitions, requests or other materials; compose routine correspondence; proofread completed typing assignments.

Compile information and maintain assigned logs, files and records; prepare routine reports as directed; review, sort, process and verify the accuracy and completeness of various documents.

Receive, sort and distribute mail and supplies as assigned; prepare outgoing mail and materials for distribution.

Operate a variety of office equipment including a copier, scanner, fax machine, computer and assigned software.

Communicate with other departments, City staff and outside organizations to exchange information and resolve issues or concerns related to assigned activities.

Assist with monitoring inventory levels of office supplies; assist in ordering, receiving and maintaining inventory of office supplies as directed.

OTHER DUTIES:

Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Modern office practices, procedures and equipment.
Telephone techniques and etiquette.
Basic record-keeping and filing techniques.
Correct English usage, grammar, spelling, punctuation and vocabulary.
Operation of a computer and assigned software.
Oral and written communication skills.
Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

Perform routine clerical duties such as filing, typing, duplicating and maintaining routine records.
Learn basic terminology, processes and operations of assigned office.
Answer telephones and greet the public courteously.
Type or input data at an acceptable rate of speed.
Operate a variety of standard office equipment including a computer and assigned software.
Understand and follow oral and written directions.
Establish and maintain cooperative and effective working relationships with others.
Communicate effectively both orally and in writing.
Complete work with many interruptions.
Receive, sort and distribute mail.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: graduation from high school and sufficient training and experience to demonstrate the knowledge and abilities to perform duties in an office environment and as listed above.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.
Constant interruptions.

PHYSICAL DEMANDS:

Dexterity of hands and fingers to operate a computer keyboard.
Hearing and speaking to exchange information in person and on the telephone.
Sitting or standing for extended periods of time.
Seeing to read a variety of materials.
Bending at the waist, kneeling or crouching to file materials.
Reaching overhead, above the shoulders and horizontally.

**CITY OF CALEXICO
RECLASSIFICATION POLICY AND PROCEDURE**

DATE: October 2, 2001

AUTHORITY: City Manager

PURPOSE: The purpose of this policy is to outline the procedures used during the reclassification study process.

POLICY: Human Resources will conduct reclassification studies upon request of the Department Head as outlined below. A reclassification study is defined as a review to determine if the duties of the position support a reallocation of the position from one classification to a different classification. The incumbent of the classification being studied must be a regular employee with the City of Calexico. All positive recommendations will be addressed during the budget process for the subsequent fiscal year.

PROCEDURE: Timelines and steps for reclassification process are outlined below.

Dates:

Action:

**September 1 –
November 1**

The employee or Department Head requests a reclassification study. If the employee requests the study, the Department Head, or designee, must acknowledge the receipt of the request by the end of the second week after the receipt of the request. The Department Head or designee must first determine if all of the following criteria have been met in order to warrant a reclassification study:

- A significant amount of the duties currently performed by the incumbent are not contained in his/her current classification specification (approximately 50%);
- The incumbent has performed these duties on a continuous basis for a period of at least six months and the duties are expected to continue;
- The incumbent has not been compensated for taking on the additional duties in any manner during this time period, such as acting pay or temporary promotion pay and;
- The incumbent's current classification has not been reviewed through a reclassification study in the preceding two years.

If the Department Head determines that a reclassification study is warranted, he/she will submit a request to Human Resources in the form of a memo outlining the reasons for the recommendation.

November 2 - 15

Human Resources distributes job analysis forms to Department Heads.

**November 16 –
December 31**

Each Department Head will request the affected employee to complete the job analysis form. Upon completion of the job analysis, the affected employee's immediate supervisor and Department Head will review the form. If they are not in concurrence with the contents of the job analysis, they will meet with the employee to discuss and attempt to resolve any differences. The employee, as well as the supervisor and Department Head, must sign off on the form. If there are areas of non-concurrence, these should be identified.

January 2

The completed job analysis form is submitted to Human Resources

**January 2-
February 28**

Human Resources staff will review the most current classification description and compare the duties, responsibilities, and qualifications of the description to those indicated on the job analysis form. The intent of the comparison is to determine whether or not the classification description reflects the actual duties and responsibilities of the employee occupying that position at the department. Human Resources may also meet with the employee and his/her supervisor to review the job analysis.

If the job analysis indicates a significant difference in duties and responsibilities, staff will search for other classifications within the City or other cities which perform similar or like tasks as those described in the job analysis.

A written report of the reclassification study's results will be prepared for the affected employee's Department Head. The report will include a proposed classification description, title, and salary range, if applicable.

March 1 - 15

Copies of the report will be distributed to the Department Head and employee. Department Heads will discuss the results of the reclassification study with the affected employee. The Department Head may submit an written appeal within 10 working days of the receipt of report should there be a disagreement with the conclusions of the Human Resources Department. A meeting will then be held to discuss the findings. The Human Resources department shall have the authority to make the final determination, in accordance with City Manager, and communicate such determination in writing to the department head.

April - May

The Human Resources department will submit all positive recommendations to the City Manager for his/her authorization to proceed to City Council.

The City Council will act on the reclassification study as part of its action on the final budget for the department. The Council has the authority to approve or deny the reclassification. If the Council approves the reclassification, any salary change would be effective at the beginning of the fiscal year.

ATTACHMENT
Job Analysis Forms

JOB ANALYSIS

Date: _____ Classification under analysis: _____

Name and classification of employee completing analysis: _____

Supervisor's name and title: _____

Division and department where classification under analysis is located: _____

Months/years that employee has occupied classification under study: _____

I. Identifying Job Tasks

In this section you are to describe the major activities or things done in performing the job. Major activities are broad task categories which, in total, describe the scope of your job. Most all jobs can be described in three to ten major activity statements. Complete a task analysis for each major activity by responding to the questions asked. **You are not obligated to list ten major activities, but space has been provided for up to ten.**

In describing the activity, select a verb (writes, files, monitors, repairs, carries, etc.) that best describes the kind of action taken. After selecting the verb, select a common noun that identifies the kind of object that verb directly affects (letters, forms, equipment, small motors, boxes, etc.). Please indicate the amount of time spent on each activity in terms of overall percentage (out of 100% of the employees time spent at work).

Activity Number

#1-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#2-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#3-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#4-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#5-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#6-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#7-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#8-Activity:

Percentage of time (1-100%)? _____

- a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.
- b) What skills, abilities, or knowledge do you need to perform this activity?
(Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#9-Activity:

Percentage of time (1-100%)? _____

II. Areas of Responsibility

A) Please check the duties and responsibilities that are pertinent to your position.

- Assign and review the work of others
- Recommend hiring or dismissal
- Train new employees
- Approve sick leave and vacations
- Administer discipline
- Complete performance evaluations
- Answer procedural and technical questions of employees
- Set priorities and make adjustments to workload

B) Please list title and department of other positions in the City of Calexico or other cities that you feel perform the same or like function as your position.

Position	Department	City

The submitted job analysis for the classification of _____
(title of classification under study)

has been completed by _____ and reviewed
(employee's name)

by _____ and _____
(employee's supervisor) (department head)

All parties are in agreement with the content of the job analysis.

Dated: _____

Employee's Signature and Title

Supervisor's Signature and Title

Department Head Signature and Title

a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

b) What skills, abilities, or knowledge do you need to perform this activity? (Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)

#10-Activity:

Percentage of time (1-100%)? _____

a) Describe the activity by answering the following questions: Why is this done? How is it done? (tools, equipment, work aids, guides used in the action) Describe the physical demands of the activity. (Stooping, lifting up to 50 lbs., climbing, etc.) Describe any risks or hazards that you encounter in this activity.

b) What skills, abilities, or knowledge do you need to perform this activity? (Knowledge of basic filing, procedures, ability to type, verbal communication skills, etc.)
