

To: Christina Cramer, Human Resources Director
From: golbou ghassemieh, Project Manager
Subject: Classification Review of Board of Supervisor's Staff Assistant
Date: March 12, 2019

Background

County of Sonoma ("County") contracted with Koff & Associates ("K&A") to conduct a review of the County's Board of Supervisors' Staff Assistant ("District Director") classification and how it is used, to determine if the current classification continues to be appropriate for the business or if a series would be more appropriate.

Classification Review Process and Objectives

The classification review procedures were as follows:

- An initial conference call and additional discussion with the County's Human Resources Director to clarify the study scope, objectives, processes, and deliverables
- Detailed information about the classification was obtained through a variety of techniques, including a written Position Description Questionnaire (PDQ) and interviews with incumbents Michelle Whitman, Susan Upchurch, Andrea Krout, Pat Gilardi and Jenny Chamberlain
- Analysis of work assigned to current incumbents to identify the major duties and responsibilities of the classification
- Analysis of the County's current job specification for the District Director class
- Review of market data to understand how comparator agency Board of Supervisor Staff positions function

The study objectives were as follows:

- Make a recommendation about the classification's job specification
- Provide a base salary only compensation analysis, using the County's typical comparator agencies and provide a salary proposal, if a new class(es) are recommended after classification review

Analysis

The current classification's job specification broadly describes the work performed by the positions, in that it is defined as an advanced-level job class, working under direction performing specialized work, including the review and analysis of issues, reports and services, representing a member of the Board of Supervisors. While the language is broad enough to encompass much of the current scope of responsibilities, there have been some significant changes not captured by the current classification specification. Important duties not captured in the current class include the degree and complexity of legislative analysis and recommendations, supervisory responsibilities, and budgetary oversight. The work performed is complex in nature and highly sensitive and requires a broad knowledge-base and a high degree of independence absent regular oversight or supervision.

Classification Recommendation

It is our assessment that the level of the preponderant duties and responsibilities assigned would be better captured through a two-level series.

Therefore, K&A recommends establishing a new flexibly staffed classification series describing a first working level and an advanced working level. The first working level provides for the steep learning curve experienced at the beginning. It can take a significant amount of time to become proficient in performing the full scope and complexity of duties and responsibilities at the expected level of independence, depending on the individual's public sector and policy related experience at entry. Adding a higher-level, accounting for the ability to perform the more complex and challenging duties at a higher degree of independence, typical of professional positions with similar learning curves at entry, is appropriate.

The County currently uses the working title of District Director for these positions, which K&A did not find to be a commonly used title in the industry. Therefore, K&A recommends updating the existing classification of Board of Supervisor's Staff Assistant to reflect a new first working level, maintaining its existing title, as it is within industry best practice, and adding the roman numeral I to signify it being the lower level of the series, and adding an advanced working level, Board of Supervisor's Staff Assistant II. The County can continue to use the current working title of District Director as desired.

K&A's recommendation to create a new level of the classification series warrants a salary review, which follows.

Comparator Agency Data Collection & Matching Methodology

At K&A's request, County of Sonoma provided the agency's list of typical comparators used in compensation surveys, which include the following Counties: Alameda, Contra Costa, Marin, Napa, Sacramento, San Luis Obispo, San Mateo, Santa Clara, Santa Cruz, and Solano. City of Santa Rosa is also typically used as a comparator agency. However, for this compensation survey, City of Santa Rosa was not considered due to the differences between a City Council and County Board of Supervisors. While a City Council is an elected body of policy decision makers, as service delivery and legislative scope differs between that of County Board of Supervisors', even if City of Santa Rosa's elected officials had staff allocations, they would not be considered comparable.

Data was collected during the month of February 2019, through agency websites; conversations with human resources and/or Board of Supervisors' staff at each comparator agency; and careful review of agency documentation such as classification descriptions, budget documents, and other documents.

Market Results

This memo and findings are meant to be a tool for the County to create and implement an equitable compensation plan. Compensation strategies are designed to attract and retain excellent staff. However, financial realities and the County's expectations may come into play when determining appropriate compensation philosophies and strategies. The collected data represents a market survey that will give the County an instrument in developing and implementing final compensation decisions.

Staffing levels and positions working for Board of Supervisors vary across counties. Within the County of Sonoma's typical comparator agencies, we found that the larger agencies, such as Alameda, Contra Costa, Sacramento, and Santa Clara, have many more staff positions ranging from 5 to 12 per Supervisor. Therefore, in the large counties, a typical model includes a Chief of Staff position that oversees all the supervisor staff aid/assistant position. Thus, the scope of the Chief of Staff classifications in the comparator agencies is higher and not considered a match to the staff positions at County of Sonoma.

Some of the smaller agencies have one to two staff positions supporting each Supervisor, which is similar to County of Sonoma's model. We found Legislative Assistant and Administrative Assistant positions that function like the County's District Director positions in that they are responsible for the general Supervisor's staff assistant body of work as well as the higher legislative analysis duties performed by the studied positions. However, the survey classifications do not supervise staff. K&A considers classifications in the market to be a match when the comparison classification's duties, scope, complexity, KSAs and MQs are overall similar at approximately 70%; as the surveyed positions are non-supervisory, they do not meet the threshold to be considered matches.

K&A presents two data sets appearing as Appendix III for consideration in the County's decision. The first table, Dataset A, includes the non-supervisory positions functioning similarly to the County's Staff Assistant position. The average top monthly salary for Dataset A is \$8,105. Sonoma's position, functioning as a supervisor, has a top monthly step of \$7,329 plus \$600/month cash allowance. The District Director class is currently 1% above Administrative Analyst II and is administered on an ongoing basis this way.

The second dataset, B, includes the higher-level Chief of Staff positions found in the larger agencies within the County's comparator market. As already stated, we do not consider these classifications to be matches. However, they are the higher level of a series and are thus presented for informational purposes given that our recommendation includes the creation of a two-level series. There are 4 Chief of Staff or similar positions in the comparator market with an average of \$9,849/top monthly.

Salary Proposal

K&A has updated the existing classification to be the first working level of the series as part of the study recommendations. K&A is aware that the County's practice is to carry over the existing salary for updated class specifications. Taking into consideration the comparator market data, the County's total compensation philosophy, and the County's current method of administering the class' salary, K&A believes the current salary to be appropriate.

Establishment of salary for the new and higher-level classification needs to be determined. Given the recommendation of the new level and the updated scope of duties, including supervisory responsibilities, and validation that duties have grown in complexity, an appropriate differential between the I and II levels should be determined. K&A suggests 10% as an appropriate differential between the I and II. In the final determination, the County should also take into consideration other classifications that are of similar scope and responsibility, level, and/or that are transfer classes.

Summary

This memorandum presents the process, methodologies, and findings for the classification and base salary review of the Board of Supervisor's Staff Assistant.

Once the County has had an opportunity to review this memo, we can arrange to discuss any comments, concerns or issues. In the meantime, should you require any clarification on the contents of this report, please do not hesitate to contact me.

Respectfully submitted by,
Koff & Associates

golbou ghassemieh
Project Manager

BOARD OF SUPERVISOR'S STAFF ASSISTANT I**Definition:**

Under general supervision and direction, learns to perform and performs a variety of difficult and complex tasks in support of a district's Supervisors' specialized work including the review and analysis of issues, reports and services; learns to and represents the Supervisor at meetings with constituents; represents the Supervisor and at various committee and community meetings; learns to and serves as liaison for the Supervisor with County departments, constituent groups, civic organizations, and public bodies; may supervise the work of regular and/or extra-help Board of Supervisors Aides or other lower level staff positions; ~~and performs related duties as required.~~

Distinguishing Characteristics:

This is the advanced first working -level job class in the Board of Supervisor's Staff Assistant series. ~~is~~ Positions in this class are allocated solely to the Board of Supervisors offices, and are responsible for ~~learning~~ utilized to and providing staff assistance to a district members of the Board of Supervisors. Work assignments are received from and are subject to review by a Board member. As experience is gained, ~~Incumbents~~ serve as a liaison and/or spokesperson for the Board member, conducting detailed research on a wide variety of topics, and coordinating and implementing programs and events. Incumbents are expected to exercise an increasingly a higher degree of initiative, independent judgment and discretion in comprehending and managing a n increasingly complex and varied workload as experience is gained, including responding to inquiries from the public and other County departments on highly sensitive and confidential issues, and assuring timely processing of requests, notices and other business activities ~~related to the work.~~ ~~An employee in this job class is appointed by a Board member, receives direction from that member, and is retained at the pleasure of that member.~~

Board of Supervisor's Staff Assistant I is alternately staffed with Board of Supervisor's Staff Assistant II and is distinguished in that the latter is the advanced working level performing more highly complex and sensitive work with a higher degree of independence. An employee in this job class is appointed by a Board member, receives direction and supervision from that member, and is retained at the pleasure of that member.

This class is exempt from the Civil Service Rules of the County of Sonoma as stated in Section 5 of Ordinance No. 305-A as amended.

Typical Duties:

Duties include, but are not limited to, the following:

Learns to and Represents the Supervisor to the community at large, to constituents in the Supervisor's district, to other officeholders and to the press; learns to and appropriately responds to answers telephone and written constituent inquiries; learns to and assists in solving constituent problems, including follow-up with all relevant County departments and/or providing referral to other entities.

Learns to and Represents the Supervisor in ~~dealings-matters~~ with County department heads and all staff members.

Learns to and researches, reviews, and summarizes~~Reviews and summarizes research on~~ policy and program options for consideration by the Supervisor; learns to and collects and analyzes data from a variety of sources, including existing and proposed legislation; learns to and prepares reports and recommendations based on analysis of collected data~~-collected; conducts analysis of existing and proposed legislation.~~

Learns to and Assists the ~~s~~Supervisor in the development of policy and legislation ~~in regard to~~regarding issues of concern of the Supervisor and ~~the~~ Board; learns to and analyzes information to conceptualize district and/or broader issues.

Learns to and Assists in ~~the~~ development~~ingment~~ and implement~~ingation of the~~ Supervisor's initiatives including learning to and undertaking complex projects requiring multi-departmental and outside agency coordination.

~~Schedules and coordinates appointments and meetings; schedules and coordinates community and neighborhood meetings during normal work hours as well as evenings and weekends;~~

Learns to and provides advice and assistance to neighborhood groups in organizing, problem solving, and effecting change; learns to and provides advice and assistance to other interest groups.

Learns to and Writes and tracks resolutions; schedules and follows agenda items; communicates with the public regarding agenda items and scheduled hearings; administers resolutions in accordance with Board and Commission members concerns.

Learns to and Writes correspondence, articles, speeches and reports according to the Supervisor's direction, preferences, and style for correspondence and speeches provided by the Supervisor or by the Assistant on behalf of the Supervisor.

Learns to and responds to public records act requests, working with County Counsel and others, in accordance with California Government Code § 6250 et seq.

Learns to and manages a budget including Tourism Impact Funds, contracts for advertising, and

staff salaries; learns to and reviews applications and makes recommendations for distribution; and learns to and ensures contracts are made to distribute funding.

Maintains district information database, historical documents and files.

May supervise lower level staff, assigning, prioritizing, and directing work; hiring, terminating, and evaluating work, including providing feedback and conducting performance evaluations.

May schedule and coordinate appointments and meetings.

Performs related duties as assigned.

Knowledge and Abilities:

Working knowledge of: principles and practices of public administration; organization, function and administrative structure of public agencies, including the role of an elected Board; ~~data analysis and statistical sampling techniques~~; techniques for dealing effectively with departmental and employee representatives, members of various public and private organizations and the public in individual group settings; research and data analysis techniques used to research, analyze, and present information in verbal and written forms; current social and political issues affecting the community and the County and state and federal governments; record keeping techniques, report preparation, filing methods and records management techniques; records management principles and practices; effective customer service principles and practices.

Some knowledge of: the Ralph M. Brown Act, Government Code § 54950 et seq; principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures; principles and practices of budget and grant fund management.

Ability to: learn to and establish and maintain effective working relationships with departmental staff, County employees and the public including diverse individuals and groups representing a wide variety of divergent views; be empathetic and a good listener; understand information requests of others and respond courteously, efficiently and accurately; assist in researching and analyzing information, evaluating alternatives and preparing recommendations for changes; assist in understanding, interpreting, explaining and applying laws, rules, policies, ~~and~~ procedures, and budgets; learn how to and explain programs to policy makers and the public; communicate effectively in English both verbally and in written form sufficient to convey information and instructions to the public and other employees in situations requiring tact, diplomacy, sensitivity, and confidentiality; use sound judgment; review confidential records and written or verbally communicated information and record such information accurately; read and comprehend technical material and directives; retain and recall information to respond to inquiries and to efficiently search files and retrieve data as required; organize and prioritize

workload and adjust to changes in workload and assignments to meet critical deadlines under pressure; ~~establish and maintain effective working relationships with departmental staff, County employees and the public including diverse individuals and groups representing a wide variety of divergent views; be empathetic and a good listener; understand information requests of others and respond courteously, efficiently and accurately;~~ and use and understand common database, spreadsheets, and word processing applications.

Minimum Qualifications:

Education and Experience: Any combination of educational course work and/or work experience which would provide an opportunity to acquire~~directly relates to~~ the knowledge and abilities listed is required. ~~Normally this would include Academic course work a degree~~ in public administration, business administration, management, political science, economics, statistics, English composition, psychology, sociology or related ~~course, or comparable experience that would be equivalent to a related degree;~~ and two or more years ~~of~~ experience in public or private agency which involved sensitive public issues and exposure to policy and budget review and interpretation.~~is desirable.~~

License: Possession of a valid driver's license at the appropriate level including special endorsements, as required by the State of California, may be required depending upon assignment to perform the essential job functions of the position.

BOARD OF SUPERVISOR'S STAFF ASSISTANT II

Definition:

Under direction, performs a variety of difficult and complex tasks in support of a district's Supervisor; represents the Supervisor at meetings with constituents and at various committee and community meetings; serves as liaison for the Supervisor with County departments, constituent groups, civic organizations, and public bodies; supervises the work of regular and/or extra-help Board of Supervisors Aides or other lower level staff positions.

Distinguishing Characteristics:

This is the advanced working level job class in the Board of Supervisor's Staff Assistant series. Positions in this class are allocated solely to the Board of Supervisors offices and are responsible for providing staff assistance to a district Supervisor. Work assignments are received from a Board member. Incumbents serve as a liaison and/or spokesperson for the Board member, conducting detailed research on a wide variety of topics, and coordinating and implementing programs and events. Incumbents are expected to exercise a high degree of initiative, independent judgment and discretion in comprehending and managing a complex and varied workload, responding to inquiries from the public and other County departments on highly sensitive and confidential issues, and assuring timely processing of requests, notices and other business activities.

The Board of Supervisor's Staff Assistant II classification is alternately staffed with the lower-level Board of Supervisor's Staff Assistant I. The Board of Supervisor's Staff Assistant II is distinguished from I level in that the latter is the first working level of the series learning to and performing the assigned work and functions with closer supervision and review. An employee in this job class is appointed by a Board member, receives direction from that member, and is retained at the pleasure of that member.

This class is exempt from the Civil Service Rules of the County of Sonoma as stated in Section 5 of Ordinance No. 305-A as amended.

Typical Duties:

Duties include, but are not limited to, the following:

Represents the Supervisor to the community at large, to constituents in the Supervisor's district, to other officeholders and to the press; appropriately responds to telephone and written constituent inquiries; solves constituent problems, including follow-up with all relevant County departments and/or providing referrals to other entities.

Represents the Supervisor in matters with County department heads and all staff members.

Researches, reviews, and summarizes policy and program options for consideration by the Supervisor; collects and analyzes data from a variety of sources, including existing and proposed legislation; prepares reports and recommendations based on analysis of collected data.

Assists the Supervisor in the development of policy and legislation regarding issues of concern of the Supervisor and Board; analyzes information to conceptualize district and/or broader issues.

Assists in developing and implementing Supervisor initiatives including undertaking complex projects requiring multi-departmental and outside agency coordination.

Provides advice and assistance to neighborhood groups in organizing, problem solving, and effecting change; provides advice and assistance to other interest groups.

Writes and tracks resolutions; schedules and follows agenda items; communicates with the public regarding agenda items and scheduled hearings; administers resolutions in accordance with Board and Commission member concerns.

Writes correspondence, articles, speeches and reports according to the Supervisor's expectations, preferences and style for correspondence and speeches provided by the Supervisor or by the Assistant on behalf of the Supervisor.

Responds to public records act requests, working with County Counsel and others, in accordance with California Government Code § 6250 et seq.

Manages a budget including Tourism Impact Funds, contracts for advertising, and staff salaries; reviews applications and makes recommendations for distribution; and ensures contracts are made to distribute funding.

Supervises lower level staff, assigning, prioritizing, and directing work; responsible for hiring, terminating, and evaluating work, including providing feedback and conducting performance evaluations.

Maintains district information database, historical documents and files.

Performs related duties as assigned.

Knowledge and Abilities:

Working Knowledge of: principles and practices of public administration; organization, function and administrative structure of public agencies, including the role of an elected Board; the Ralph M. Brown Act, Government Code § 54950 et seq; techniques for dealing effectively with departmental and employee representatives, members of various public and private organizations and the public in individual group settings; research and data analysis techniques used to research, analyze, and present information in verbal and written forms; current social

and political issues affecting the community and the County and state and federal governments; principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures; record keeping techniques, report preparation, filing methods and records management techniques; records management principles and practices; effective customer service principles and practices; principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures; principles and practices of budget and grant fund management.

Ability to: establish and maintain effective working relationships with departmental staff, County employees and the public including diverse individuals and groups representing a wide variety of divergent views; be empathetic and a good listener; understand information requests of others and respond courteously, efficiently and accurately; research and analyze information, evaluate alternatives and prepare recommendations for changes; understand, interpret, explain and apply laws, rules, policies and procedures, and budgets; explain programs to policy makers and the public; communicate effectively in English both verbally and in written form sufficient to convey information and instructions to the public and other employees in situations requiring tact, diplomacy, sensitivity, and confidentiality; use sound judgment; review confidential records and written or verbally communicated information and record such information accurately; read and comprehend technical material and directives; retain and recall information to respond to inquiries and to efficiently search files and retrieve data as required; organize and prioritize workload and adjust to changes in workload and assignments to meet critical deadlines under pressure; and use and understand common database, spreadsheets, and word processing applications.

Minimum Qualifications:

Education and Experience: Any combination of educational course work and/or work experience which would provide an opportunity to acquire the knowledge and abilities listed is required. Normally this would include a degree in public administration, business administration, management, political science, economics, statistics, English composition, psychology, sociology or related course, or comparable experience that would be equivalent to a related degree; and at least one year of experience serving a member of a Board of Supervisors, or three or more years of experience in a public or private agency which involved sensitive public issues and exposure to policy and budget review and interpretation.

License: Possession of a valid driver's license at the appropriate level including special endorsements, as required by the State of California, may be required depending upon assignment to perform the essential job functions of the position.

**County of Sonoma - Board of Supervisor's Staff Assistant
February, 2019**

Survey Dataset A Comparable to Junior District Director

Typical County of Sonoma Comparisons		
County/Agency	Class Title	Top Monthly Salary
Alameda County	Supervisor's Assistant	\$10,449
Contra Costa County	Board of Supervisors Assistant-Specialist	\$7,300
Marin County	Board Aide	\$8,247
Napa County	Staff Assistant - Board of Supervisors	\$7,313
Sacramento County	Special Assistant to Board of Supervisors	\$6,786
San Luis Obispo County	Legislative Assistant	\$6,417
San Mateo County	Senior Legislative Aide	\$11,225
Santa Clara County	N/C	
Santa Cruz County	County Supervisor's Analyst	\$8,947
Solano County	Board of Supervisors Aide	\$6,694
City of Santa Rosa	N/C	
Average of Typical County Comparisons		\$8,153
95% of Market Average		\$7,745

Note: None of the comparison positions supervise but otherwise function in a comparable capacity; San Mateo's position is a lead.

Survey Dataset B Higher-level Classifications

Typical County of Sonoma Comparisons		
County/Agency	Class Title	Top Monthly Salary
Alameda County	Chief of Staff	\$12,210
Contra Costa County	Board of Supervisors Assistant - Chief Assistant	\$8,050
Marin County	N/C	
Napa County	N/C	
Sacramento County	Administrative Assistant Board of Supervisors	\$9,742
San Luis Obispo County	N/C	
San Mateo County	N/C	
Santa Clara County	N/C	
Santa Cruz County	Chief of Staff	\$9,396
Solano County	N/C	
City of Santa Rosa	N/C	
Average of Typical County Comparisons		\$9,849
95% of Market Average		\$9,357

Note: These positions function at a higher scope and responsibility than Sonoma's positions and are provided as informational.

**County of Sonoma - Board of Supervisors Staffing Levels
February 2019**

Board of Supervisors - Staffing - Comparable Counties (Updated Feb 2019 Survey Data)						
County/Agency	Budget in Billions	Population	Number of Supervisors	Avg Number of Constituents per Supervisor	Avg Number of Staff per Supv	Total Number of BOS Staff
Sonoma	\$ 1.3	503,332	5	100,666	1.0	5
Alameda	\$ 3.4	1,660,202	5	332,040	5.4	27
Contra Costa	\$ 4.2	1,149,363	5	229,873	5.2	26
Marin	\$ 0.8	263,886	5	52,777	2.0	10
Napa	\$ 0.5	141,294	5	28,259	0.4	2
Santa Cruz	\$ 0.8	276,864	5	55,373	2.6	13
Solano	\$ 1.1	439,793	5	87,959	2.0	10
San Luis Obispo	\$ 0.6	280,101	5	56,020	1.0	5
San Mateo	\$ 3.0	774,155	5	154,831	3.2	16
Sacramento	\$ 4.5	1,529,501	5	305,900	3.0	15
Santa Clara	\$ 6.6	1,956,598	5	391,320	12.6	63
City Santa Rosa	-	-	-	-	-	-
Avg of other counties-Sonoma not included	\$ 2.4	815917.18	5	163183.44	3.49	17.43

Board of Supervisors - Staffing - Comparable Counties (2013 Data)						
County/Agency	Budget in Billions	Population	Number of Supervisors	Avg Number of Constituents per Supervisor	Avg Number of Staff per Supv	Total Number of BOS Staff
Sonoma	\$ 1.3	487,011	5	97,402	1.0	5
Alameda	\$ 2.6	1,532,137	5	306,427	6.6	33
Contra Costa	\$ 2.8	1,065,117	5	213,023	5.2	26
Marin	\$ 0.4	254,790	5	50,958	2.0	10
Monterey	\$ 0.07	420,668	5	84,134	3.0	15
Napa	\$ 0.4	138,255	5	27,651	0.4	2
Santa Barbara	\$ 0.8	427,267	5	85,453	3.0	15
Santa Cruz	\$ 0.6	265,981	5	53,196	2.2	11
Solano	\$ 0.8	413,786	5	82,757	1.2	6
San Luis Obispo	\$ 0.5	271,483	5	54,297	1.0	5
Avg of other counties-Sonoma not included	\$ 1.0	532,165	5	106,433	2.7	14