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**...MANAGING CHANGE
WITH EFFECTIVE
HUMAN RESOURCES PROGRAMS**



for

**A Study of the Classification
and Compensation System**

RFP 135-04RLD

Jacobson, Betts & Company
Seattle, Washington *USA*

JACOBSON, BETTS & COMPANY
Management Consultants

June 17, 2004

King County Legislative Branch
821 2nd Avenue
Seattle, WA 98104

Dear Proposal Reviewers:

Jacobson, Betts & Company is pleased to submit the enclosed proposal to assist the King County Legislative Branch/Council with classification and compensation consulting services. The description of the project and your response to our questions have enabled us to develop a project work plan which we believe is uniquely responsive to your needs.

To facilitate your review, we would like to point several aspects of the proposal that make us uniquely qualified to assist the Council:

- Compensation Consulting Experience.** We are primarily known for our consulting in total compensation. Our pioneering approaches have given clients state-of-the-art systems and decision support. **We have never failed to implement a program.** We are known for working with committees and diverse employee groups.
- JOBMEAS™ System of Job Evaluation.** Our expertise in job evaluation is evidenced by the sophisticated, yet user-friendly JOBMEAS™ system, which is widely, known for its ability to address the internal equity of positions. We believe that no other consultants are better positioned to work with your Human Resources professionals and Committees to adjudicate pay arrangements for employees
- Fee Structure and Schedule.** Our proposal provides for about **372 hours** and substantial on-site professional consulting. We believe the estimate for professional fees will provide the Council with significant value-added for its expenditure of consulting dollars.
 - ▶ **\$46,640** is our “not-to-exceed” project estimate, including all out-of-pocket expenses.
 - ▶ We are set up to complete the project in **your time line. Guaranteed.**
- Employee Involvement.** We are proposing a work plan that gets Committees and many employees involved, and provides quick feedback. Our interview methods will make employees feel relaxed and that they are really a part of the project.

- Automated Decision Support.** We have developed computer-aided tools to expedite the job alignment process and design of salary structures. These tools will enable the Council to understand cost and other implications of collective bargaining and competitive strategies. The Council receives them as part of our service.

- Salary Survey.** We will collect survey information other organizations employing the same positions and skills. Our data tabulation methods will give you decision support beyond what any other firm can provide.

We are very enthusiastic about the potential of working with King County. In that regard, you have our commitment to high quality, cost-effective, and timely results. Please note that if any of the proposed work plan steps are not required or completed by the Council, we will adjust our fee downward accordingly.

Sincerely,

A handwritten signature in black ink, appearing to read "Vance B. Jacobson". The signature is fluid and cursive, with a large initial "V" and "J".

Vance B. Jacobson

Enclosure

King County Council

Job Classification Review

PROPOSAL for RFP 135-04RLD

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I
Introduction
Objectives
Deliverables

Jacobson, Betts & Company
Seattle, Washington *USA*

I

INTRODUCTION AND OBJECTIVES

A. Background

The Legislative Branch of King County is concerned about the ability of existing salary administration plans to attract, maintain, and reward a high performing labor force that can deliver the scope and quality of services required by the Council and the County. The King County Council is concerned about certain aspects of the current job classification and compensation programs for its appointed staff. These concerns include, but are not limited to, external competitiveness, internal equity, and ability to recognize and reward high achieving employees.

The Legislative Branch/King County Council is seeking assistance from a qualified consulting firm to conduct a classification and compensation study of its appointed staff which includes about 150 management, professional, and support in 57 job classifications. The Council wants to develop a classification and compensation plan assuring the following:

- Internal integrity and fairness of pay relationships,
- External competitiveness sufficient to attract, retain, and motivate a quality work force in a competitive cross-industry environment,
- Consistent and equitable format and design of compensation plans,
- Capability to offer recognition, growth, and rewards to employees who develop skills and have high levels of achievement.
- Cost-effectiveness,
- Compatibility with other programs such as career ladder advancement, performance, and diversity,
- Conformance of class descriptions with regulatory trends such as Americans with Disabilities Act, etc.,
- Acceptance and understanding by employees, and
- On-going ease of maintenance.

B. Project Objectives and Deliverables

The following statements of project objectives and deliverables are based on our understanding of the Council's objectives for the compensation study, by way of the request for proposals:

1. **Internal Equity:** establish and maintain a compensation structure for each job classification that objectively and equitably reflects its relative value to other positions in the Council.

Deliverable: The **JOBMEAS™** system of job evaluation which will be used as the primary standard on which all positions will be aligned.

Deliverable: A salary structure (grid) acceptable to the Council. The salary structure will be designed to consider the potential need for designing career options and rewarding high levels of achievement.

Deliverable: A job classification structure and range placement of employees, reflecting the best and good faith efforts to achieve internal pay equity among all positions and individuals.

Deliverable: Additions to, or elements of, the compensation plan that can offer recognition, growth, and rewards to high achieving employees.

2. **External Competitiveness:** provide a compensation structure for each class that will enable the Council to attract and retain the level of talent required to achieve its mission; and a compensation structure that meets the Council's existing financial resources.

Deliverable: External market analysis using salary information from public service organizations, private law practice, and other industry sectors. The Jacobson, Betts & Company salary information data bases will supplement data gathering.

3. **Job Descriptions:** provide the Council with a complete set of job classification descriptions, one for each class. The descriptions not only describe the purpose, responsibilities, knowledge, skills, and abilities required for successful performance, but also describe the Americans with Disabilities Act inclusions.

Deliverable: Descriptions for all job classifications including a computer file copy to facilitate easy updating. Each description will

have a summary, a section describing where the job is in a career ladder, the general competencies expected for advancement, essential duties and responsibilities, qualifications (knowledge, skill, abilities, physical requirements, education and experience), exempt/non-exempt designation, and related ADA needs.

4. **Employee Acceptance:** involve employees in the process and communicate the compensation study progress and results in a manner which will enable them to understand how the plan will affect them individually, and the methods of maintaining and updating it in the future. Receive employee input and feedback on job content and elements of the study.

Deliverable: Design communications about the program which are understood by all employees, provide feedback to employees at each major project milestone, receive input from employees, and develop pro-active problem-solving processes.

Deliverable: Implement a system for exploration and introduction of ideas and concepts, reporting on project progress, training, and feedback, with the Council's Employment Committee and Staff Study Committee.

5. **Implementation and Maintenance:** provide a plan with the capability of responding to organization changes, job design, external market, and internal economic conditions.

Deliverable: Job evaluation procedures, problem-solving and decision-making tools, and data management support to ease on-going administration, and training.

Deliverable: A computer-aided model that identifies the costs of implementation in the current fiscal year plus three years.

6. **Cost Effectiveness:** ensure the program properly allocates resources to employees within the Council's financial limitations.

Deliverable: Using the computer-aided model, provide the Council with specific implementation cost strategies and labor budgets that comply with fiscal limitations of the Legislative Branch.

The work plan which follows, describes the steps required, in approximate chronological order, to achieving these project objectives.

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Jacobson, Betts & Company
Seattle, Washington *USA*

II PROJECT WORK PLAN

As a preface to the work plan, we would like to point out several aspects of our background and approach that make us uniquely qualified and provide the King County Legislative Branch/King County Council with substantial value for its consultant investment.

- ❑ **Internal Job Evaluation.** Jacobson, Betts and Company has developed a point-factor job evaluation technique (JOBMEAS™) which is well known for its ability to align job classes according to their **relative worth** to the organization.
- ❑ **Automated Decision Support.** We will provide our computer software, SALPLAN™, which streamlines the job evaluation process, enables budget and financial analysis, and allows for change. The support we provide will lessen your time spent processing pay-related decisions.
- ❑ **Salary Planning and Budgeting.** In addition to developing a compensation structure, we also provide computer-aided tools which help you **equitably allocate pay increase dollars** and maintain cost control over total expenditures.
 - ❑ In short, this tool can optimize equitable allocation of salary dollars within virtually any budget constraint.
- ❑ **Class Descriptions.** Our default format for position descriptions is recognized for its ability to convey job content beyond the typical generic statements. We include information on key criteria for advancement to/from other positions in a career ladder and expanded language for consideration of the Americans with Disabilities Act.
- ❑ **Industry Experience.** Jacobson, Betts and Company has completed similar assignments with municipal government, education, and other non-profit service organizations of similar size and complexity.

The following tasks describe how we propose to conduct the project to meet the objectives of the Council.

TASK A: INITIATE THE PROJECT

The first task of the project is designed to review and revise, as necessary, the work plan, timelines, and milestones with the Council, Council Employment Committee, Staff Study Committee and others to ensure that the project steps are structured to meet the project's objectives.

Step 1: Finalize the Work Plan. We will work with the Council and Committee's to confirm the scope of the project, review and approve forms, and establish a schedule for major project milestones.

Step 2: Initiate Communications. Once the project work plan is finalized, we plan to begin the project by communicating the project's purpose and design with the Council, Committee's

and employees. We believe the success of the project is linked to establishing a participative climate at the outset. In these communications, we will talk about:

- Key project objectives
- Level of employee involvement
- Steps required to meet project goals
- Results to (and not to) expect from the project

We recommend using a process by which each department and site selects one-to-two representatives to receive orientation about the project and our data gathering needs. They will take a folder of information back to the work location and serve as a resource to answer questions. Second, we will hold an open forum several weeks later at a time that maximizes voluntary attendance.

Step 3: Facilitate Exploratory Discussions

We will develop communications, a presentation, and facilitate a group process that discusses varying approaches to job classification and compensation. The group process will include Council members and Committee members.

TASK B: CONDUCT JOB ANALYSIS

In this task, we will maximize our understanding of the job classifications and develop a classification scheme that is internally equitable and considers skill-based career growth ladders for support, professional, and managerial classifications.

Step 1: Conduct an Organization Review. We will examine pertinent organization and personnel system documents and interview top officials to learn about the range of services provided by the Council and to understand how jobs are designed to deliver services.

The results of the organization review will assist us in the development of job classifications, career ladders, and ultimately in pay relationships.

Step 2: Obtain Job Documentation. This step is designed to obtain the most current and complete job content information on the Council-appointed positions. The information ultimately permits the updating of classifications, descriptions, and the design of career ladders.

2.1 Administer a Job Description Worksheet. Our proprietary Worksheet facilitates the classification, description, and job evaluation processes. It comes with clear instructions, is easy to complete, and is designed to obtain information to:

- Determine the number and type of job classifications,
- Prepare class descriptions,
- Review criteria for compliance with the Americans with Disabilities Act,
- Support the job evaluation and pay determination process,
- Extend recommendations on exempt/non-exempt status of classes, and
- Describe performance criteria (for potential use in the future).

We want all classified employees will complete a Worksheet, however, are open to consolidations. We will work with the Staff Study Committee to determine the most efficient distribution and retrieval method.

Step 3: Conduct Interviews. We will meet with **at least one employee in every job classification** to supplement the information we receive from the position descriptions and/or the Job Description Worksheet. For purposes of establishing a maximum fee proposal, we are estimating that **90 employees will be interviewed.**

Step 4: Define Preliminary Job Classes. Job classification is the process of grouping "like" or substantially similar kinds of work into broad categories or "classes". Classes can then be arranged to build skill-based career ladders for specific occupations. We will examine and use existing classifications where appropriate, and suggest new classes, as a result of the interview process. The final class recommendations will be made to the Committees.

The interviews will serve several purposes. First, we will obtain additional facts about the content of jobs. **This is important for creating the descriptions and to support the evaluation and survey processes.** Second, it provides us an opportunity to answer questions about the program. Interviews typically require 45 minutes to 1 hour to complete.

TASK C: DESIGN CLASSES AND PREPARE DESCRIPTIONS

A class description is a written statement of the characteristic duties, responsibilities, and qualification requirements that are necessary to carry out the job. We will recommend a format and write a "final" draft description (draft and one revision) for each job classification serving the Legislative Branch. A sample appears in Appendix B.

The information gathered in Task B will provide the basis from which to update class descriptions. Each description will be written and reviewed for ADA compliance, then made available to supervisors and employees for acceptance.

When complete, we will distribute descriptions for review and feedback. This will be accomplished by routing a full set of documents to each department, highlighting the applicable descriptions. We will work with the Committees on the timing of communications.

Our proposal is made with the assumption we will prepare "final draft" descriptions for **57 job classifications.** This means a rough draft and editing through the feedback process.

TASK D: INITIATE THE SALARY SURVEY

The first step in the process of designing compensation structures is to compare the current pay practices of the Council to competitive practices. The "market" is typically determined by the area from which employees are recruited or to which employees are lost. For example, the lowest skill levels are typically recruited in a local market, while higher skilled, e.g., professional-level employees may be recruited on a regional basis. We propose working closely and collaborating with Administration and the bargaining unit to define the markets and organizations to whom the Council will be compared.

Step 1: Compile Salary Survey Data. Jacobson, Betts & Company maintains a data base of information on base salaries, benefits, and total remuneration for over 500 positions in virtually every industry classification and geographic region. These resources are available to the Council. We will also collect survey of up to **12 comparable organizations and data sources.**

We will accumulate survey data in the following manner:

- ▶ Define the geographical markets and organizations with whom to compare "like" kinds of positions.
- ▶ Select a set of benchmark classes to survey in the defined market area. Selection of these classes are critical to obtaining valid and valuable survey results. The benchmarks should be easily recognizable classes and represent a cross-section of Council employees.
- ▶ Obtain salary information from the defined market sample and extract relevant data from published surveys and our firm's data base. The data will include but not be limited to:
 - ▶ Actual pay practices
 - ▶ Projected increases to salaries
 - ▶ Special reward plans
 - ▶ Salary ranges
 - ▶ Administrative practices
 - ▶ Add-on costs of benefits

TASK E: CONDUCT JOB EVALUATION

We believe that a point factor job evaluation method, if properly designed and implemented, is the superior approach to evaluating internal equity and assigning jobs to pay grades for the following reasons:

- ▶ Point factor systems provide a constant measurement stick on which to compare jobs.
- ▶ They provide an automatic audit trail for jobs and career ladders that have been evaluated.
- ▶ They are able to evaluate large volumes of diverse jobs.
- ▶ They are definable, easily understood by employees, and therefore more acceptable by both management and employees.

Step 1: Introduce the JOBMEAS™ System of Evaluation. We propose to evaluate all positions using the point factor job evaluation system, **JOBMEAS™**. The **JOBMEAS™** system is widely used in private industry, service, and public sector organizations for all types and levels of positions. The **JOBMEAS** system consists of five factors which have been constructed to conform to the basic legal requirements that pay can be differentiated on differences in skill, effort, conditions and responsibility. The **JOBMEAS™** system summary appears in Appendix A.

The **JOBMEAS™** system evaluates the job content factors related to job knowledge or mental requirements, problem solving, physical skills and effort, human relations, working conditions, and accountability for end results. The system does not identify age, race, sex, or other similar class-protected variables as part of the evaluation process. The evaluation process focuses on the content of the job, not on the individual incumbent, performance, or job tenure. This job relatedness feature is a crucial test in discriminatory and comparable worth issues.

The system is as applicable to the most senior positions as it is to the lowest level positions, and those found in bargaining units. The system measures the various job related components of all positions. The optimal weighting of individual measurement factors enables equitable treatment of highly educated jobs as well as those requiring specific physical skills. In fact, this system

is the only one that includes "learned physical skills" as a factor.

Step 2: Select a Feedback and Review Approach. At this stage of the project, it is important to have continual outreach to Council employees on "how things are going". Two methods of feedback are proposed:

- ▶ Prepare a brief communication for all employees.
- ▶ Use the Council Employment Committee and Staff Study Committee to serve as a sounding board on job design matters, review internal alignments, and communicate project status to all other employees.

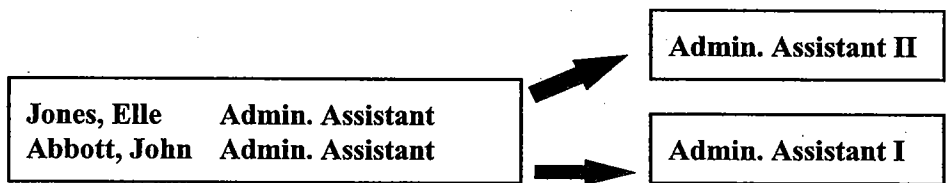
We recommend using both approaches during the project because it helps earn buy-in from employees and will enable us to provide more direct outreach to employees.

Step 3: Evaluate all Positions. We will first evaluate "benchmark" positions, then all remaining positions. The evaluation of benchmark positions will provide support to the development of salary structures, covered in Task G, and also give us a "frame" for evaluating other positions. The evaluation of all classes will produce an internal alignment and will facilitate the assessment of internal equity. **We will train the Committees and Human Resources professionals in the system concurrently with evaluating benchmark classes.**

| <u>Position</u> | <u>MR</u> | <u>PR</u> | <u>HR</u> | <u>WE</u> | <u>AC</u> | <u>Points</u> | <u>Grade</u> |
|----------------------------|-----------|-----------|-----------|-----------|-----------|---------------|--------------|
| Administrative Assistant I | D2-5 | B1-1 | B1-4 | A2-1 | B2-5 | 1,570 | 17 |

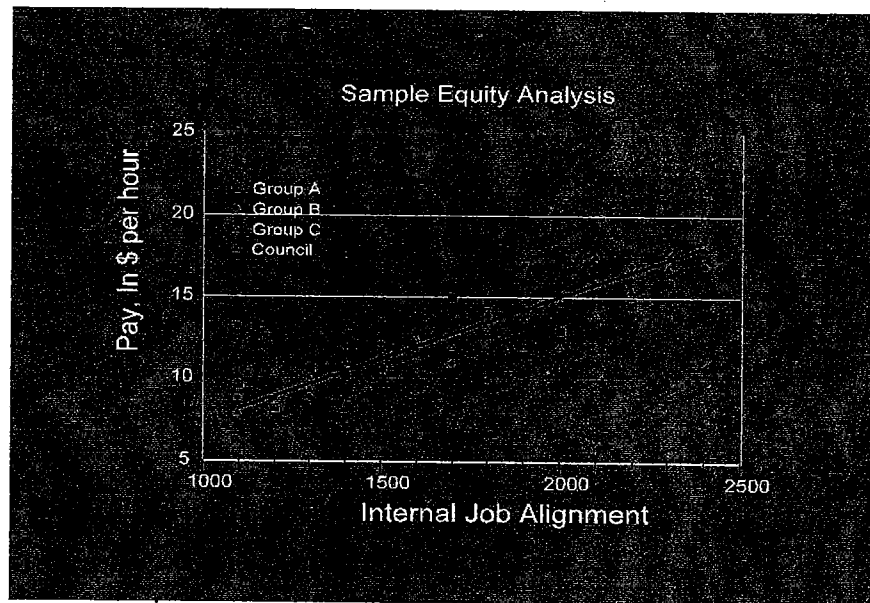
↙ ↘
 ↘ ↙ Point-factor results optimize internal listing or ranking of jobs.

Step 4: Assign Individuals to Classes. Individual employees will be assigned to classes based on job content. A substantial portion of employees will have completed Worksheets, the remainder will be assigned based on existing job allocations (e.g. if one or a few Instructional Assistants completes the Worksheet, the others would be automatically assigned).



Step 5: Analyze Internal Pay Equity. We propose analyzing the equity of the organization's internal pay practices. The analysis of internal equity determines and measures the degree to which the Council is compensating its employees equitably in relation to other positions.

Once jobs have been evaluated according to their job content, each position is graphed on a chart by locating a dot at the intersection of the job content and the salary being paid each person occupying a particular position. An example of the analysis is shown below.



The line drawn through the pattern of dots summarizes the 'trend' of salaries, given the 'rank' of the job, so that we can easily assess the variation in pay among individuals. This analysis allows a direct comparison of salary practices to be made within and between occupational classes. Our focus in this analysis is to identify positions lying well above and below the line and determine why they are being compensated more or less than other positions of similar ranking.

We will provide input on how to address the results of this analysis.

Step 6: Provide Feedback. After we complete the job classification and internal equity alignment steps, we will communicate the results to the Committees. We will listen to their feedback, particularly in the areas of career ladders, range compression, and perceived internal relationships.

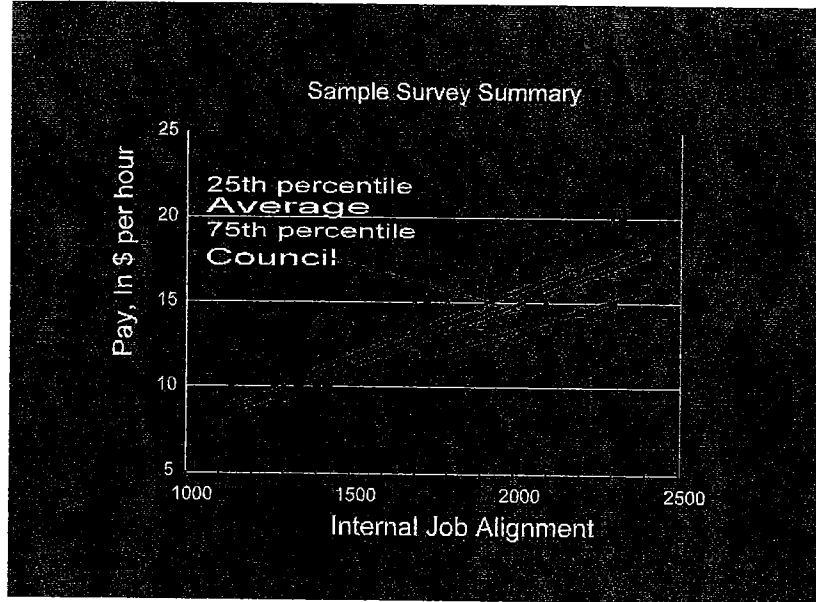
The feedback we receive will enable us to modify the initial internal alignment results, as necessary.

We will also provide an overview of the work-in-progress to the Council, if necessary.

TASK F: PREPARE SURVEY ANALYSIS

The salary survey and job evaluation tasks should be completed about the same time. The evaluations are important because they will enable salary-level predictions for classes not included in the survey. The results of the salary survey and related analyses will indicate how the Legislative Branch compensates its employees relative to the defined markets. The results will form the basis for recommending new salary structures for all positions. The results will be presented in both linear (graphic) and tabular form. **Additionally, the results will project the cost implications of paying at various competitive levels.**

This task involves merging the results of the internal job evaluation with the survey results to construct a salary structure.



Step 1. Analyze, Summarize, and Present Survey Data. The external survey data will be collected, tabulated, analyzed, and compared to the Council's salary practice and structure. The data will be analyzed and reported statistically with representations made for:

| <u>Title</u> | <u>25th</u> | <u>40th</u> | <u>Salary-Actual</u> | | | | <u>KCC Competitive</u> |
|-----------------|------------------------|------------------------|----------------------|-------------|------------------------|------------------------|------------------------|
| | | | <u>Avg.</u> | <u>Med.</u> | <u>60th</u> | <u>75th</u> | |
| Admin. Asst. II | \$18.02 | \$19.31 | \$22.61 | \$22.64 | \$24.77 | \$26.11 | 50 |

This means the organization is paying at the "Median" ↴

| <u>Title</u> | <u>25th</u> | <u>40th</u> | <u>Salary Range Maximum</u> | | | | <u>KCC Competitive</u> |
|-----------------|------------------------|------------------------|-----------------------------|-------------|------------------------|------------------------|------------------------|
| | | | <u>Avg.</u> | <u>Med.</u> | <u>60th</u> | <u>75th</u> | |
| Admin. Asst. II | \$25.61 | \$25.91 | \$26.00 | \$26.00 | \$26.55 | \$27.10 | 40 |

This means the organization is paying at ahead of 40% of and behind 60% of competitors. ↴

- ▶ Salary Ranges: Average range minimum-midpoint-maximum.
- ▶ Actual Pay: we report the Average, Median, 25th and 75th percentiles.
- ▶ Special administrative practices such as how others address salary compression issues (e.g. through career ladders and internal policies).
- ▶ Projected increases in salary budget, individual pay increases, and cost-of-living adjustments.
- ▶ The average add-on cost of benefits and other compensable elements.

- ▶ The costs, and other implications, to the Council of setting salary ranges at a specific competitive level (e.g., the Median, 60th, or 75th percentile).

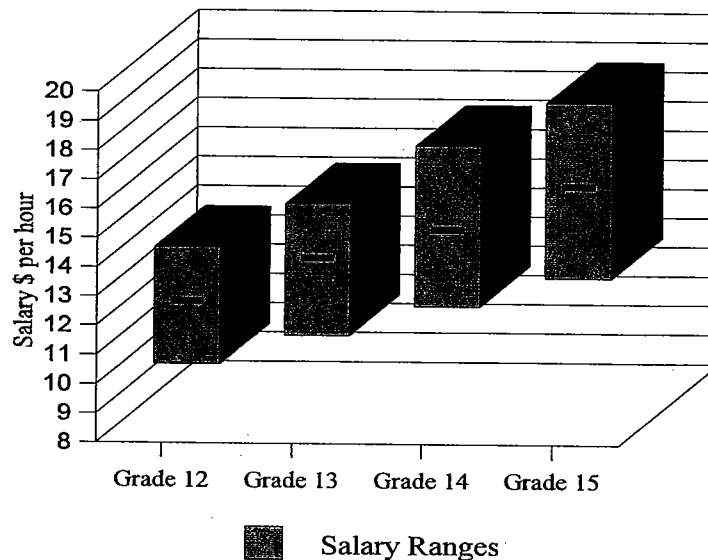
TASK G: DEVELOP COMPENSATION STRUCTURE(S)

Designing a compensation plan involves the integration of several factors including the Council's compensation philosophy, culture, mission, and ability to fund a specific compensation system. In addition, the plan must be internally equitable, externally competitive, and meet the Council's requirements concerning retention and performance. We propose to work closely with the Committees, and others as needed, to define the compensation philosophies and strategies that will be used to guide the design of the recommended compensation plan.

Step 1: Design and Develop Salary Structures (salary ranges). After comparing the survey results with the Council's practices and structures, then overlaying the Council's defined compensation policies and philosophies, we will produce a recommended salary structure(s) for all classes. Salary ranges can be designed for each class and position, however we suggest that a grade system be established for all classes. This will greatly simplify salary administration as well as making changes to the salary ranges over time. We will concentrate on designing a single salary structure for all employees, if possible.

Step 2: Develop a Range Conversion Plan. We will prepare recommendations and procedures to the Council that will:

- ▶ Provide a graded compensation structure encompassing all classes; one that is reflective of the results of the survey, the Council's defined compensation policies and philosophies, and ability to pay.



- ▶ Develop a specific action plan for converting from one set of pay structures to another.
- ▶ Address related issues such as pay compression, costs, etc..

TASK H: DEVELOP AN IMPLEMENTATION PLAN

The Compensation Structure will show the recommended salary range for each classification. It will also provide recommendations or options on how employees should be converted to the structure(s) in a way that meets the needs and concerns of the Council. It has been our experience that to fully accomplish internal and external pay equity goals, implementation may require several years to be phased in.

This task is designed to produce a long term implementation and program maintenance plan.

Step 1: Develop a Communications Plan. We will recommend a process for communicating the results of the project to employees.

1.1 Review Process (Appeals). We will design a process for reviewing employee feedback and concerns about the compensation plan. We also develop criteria for these and future reviews. The criteria may include aspects such as:

- ▶ Job qualifications and conversion to job evaluation factors.
- ▶ Assignment within a career ladder.
- ▶ Correction of erroneous data.

1.2 Adjudicate Reviews. We will work with a Committee or personally process job classification reviews. Unfortunately, it is not possible at this juncture to predict the time required for our involvement in the appeals process. As a result, we are setting our proposal based on a maximum of 8 hours professional time to process reviews.

Step 2: Develop Implementation Plan. There are several considerations to developing an implementation plan: development of the strategy or plan, internal equity issues, implementation cost, and the time required to phase in the new strategy.

We propose to work closely with the Committees and employees in general to develop an implementation plan that achieves the desired internal equity and external competitiveness goals. We will then develop a time frame *and* the steps for successful implementation, taking into full consideration the financial capabilities of the Legislative Branch.

Step 3: Train Staff in Use of the System. We will train Committees and Human Resources professionals to maintain the classification and compensation program. The training modules will include:

- ▶ Job Evaluation, using the **JOBMEAS** system, 6 - hours
- ▶ Use of **SALPLAN**, the computerized decision tool, 2- hours
- ▶ Updating Salary Structures, 1 - hour

TASK I: COMPLETE THE FINAL REPORT

We will prepare a draft report and after a review by the Committees, will prepare a final report for presentation to the Council.

The report will go beyond a description of the objectives, scope, methodology, finding, conclusions, and recommendations for implementing the study findings and also provide technical materials supporting job classification, job evaluation, and development of salary structures.

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III

Qualifications

Resumes

References

Jacobson, Betts & Company
Seattle, Washington *USA*

III. Qualifications of the Firm

A. Experience

Jacobson, Betts & Company combines over 60 years of consulting experience into a small, yet senior-level staff who lead the industry with technical and behavioral innovations, creative approaches to solving the challenges given by clients, and a "style" that maximizes employee involvement.

Our history contains milestones and accomplishments that are indicative of our capabilities and commitment to continuous innovation and improvement.

1976 ...

JOBMEAS™ begins with research in response to the inability of other systems to be complete tools for determining internal pay relationships.

1979 ...

JOBMEAS is enhanced with the Learned Physical Skills and Performance Environment factor elements, giving us the capability to evaluate line, staff, management, support, production, and service jobs in their proper order.

1981 ...

JOBMEAS™ is recognized as a system with superior capabilities in responding to the issue of comparable worth of jobs. Vance Jacobson is interviewed by public broadcasting. Other firms take note of the approach.

1983 ...

We introduce skill/competency-based career ladders where employees and employer partner improved competitiveness along with learning and development. The first competitive readings on this subject appear years later.

1987 ...

JOBMEAS™ is computerized, but not in a format that requires significant cost investment. It appears and runs in a spreadsheet environment. Other firms follow our lead.

1991 ...

Betts joins Jacobson Company to form Jacobson, Betts & Company. Innovations and enhancements to earlier milestones continue. We develop ...

- ▶ models to analyze **total remuneration** strategies,

- ▶ techniques for **optimizing staffing levels and salary budgets**,
- ▶ “**cafeteria cash**” (not bene fits) salary administration philosophy and programs where employees receive performance-based rewards in line with their own values and needs, and
- ▶ **pay-for-learning** systems that succeed conventional performance management systems and advance employees based on acquisition of new, work-related skills and knowledge. Productivity increases for these clients ranges 25% to 48%.
- ▶ **skill-based career ladders** for education.

To date, Jacobson, Betts & Company consultants have served over 400 organizations in virtually every industry, including municipal government.

B. Project Staffing

Vance Jacobson, the founding partner of the firm, will manage the project and also serve as a senior on-site consultant. He has recently managed and completed several closely related projects including the Genie Industries, Clovis Unified School District, Seattle School District, Portland (OR) Community College, El Monte City and High School Districts, College of the Redwoods, and Cerritos College. He is the project manager for studies currently being conducted at the City of Oregon City, Barstow, San Jose, and Sierra Community Colleges as well as Simi Valley Unified School District.

Vance Jacobson will serve as your project leader and consultant in all aspects of the project. Mr. Dan Betts will participate in the project as a senior contributor.

Dan Betts has recently managed and completed work for large, complex organizations such as Alumax/Alcoa and the Oregon Judiciary Department.

The resume of your project team, Mr. Jacobson and Mr. Betts, follows this chapter. To view more information about Jacobson, Betts & Company, please visit our web site at <http://www.jacobsonbetts.com>.

C. Client References

- ▶ **Port of Seattle**, Seattle, Washington. Please contact Ms. Rosalie Walz, Assistant Director of Human Resources at (206)728-3293; Mr. Charles Blood, Director of Airport Operations at (206)433-5385. Significant accomplishments include:

- ▶ Development of a private industry approach to salary ranges,
 - ▶ Design and implementation of a performance management system containing participatory review, peer review, and links to professional development and compensation.
 - ▶ Conducted a nation-wide salary survey for marine and air ports which led to the development of the competitive philosophy.
- ▶ **Genie Industries**, Redmond, Washington. Please contact Mr. Gordon Anderson, Director of Human Resources at (425)556-8651. Significant accomplishments include:
- ▶ Development of a broad-banded approach to salary ranges and compatible with a pay-for-performance philosophy.
 - ▶ Conducted annual nation-wide salary surveys to support the development and maintenance of the competitive philosophy and structures.
- ▶ **Oregon Judicial Department**, Salem, Oregon. Please contact Mr. Duane M. Anders, Director of Human Resources (recently retired) at (503)-743-2231. Significant accomplishments during work-in-progress include:
- ▶ Job analysis, evaluation, and competitive assessment of legal, investigative, and support positions. Developed broad-based career ladders.
- ▶ **El Monte City School District**, El Monte, California. Please contact Mr. Michael Raymond, Director of Personnel, or Mr. Richard White, Assistant Superintendent for Human Resources, at (626) 453-3723. Study encompassed classified and management employees.
- ▶ Developed a compensation plan to include skill-based career ladders.
 - ▶ Conducted a cross-industry salary survey which included education, service industries, and the private sector.
 - ▶ Developed and executed an implementation plan for improving competitiveness and maintaining that standing over time.
- ▶ **Clovis Unified School District**, California. Please contact Mr. Bill McGuire, Associate Superintendent for Administration at (559) 327-9000, or Terry Bradley, PhD, Superintendent. Significant accomplishments during work-in-progress

include:

- ▶ Interviewed about 350 employees in 160 classifications on schedule and within budgetary limits. Developed broad-based career ladders.
 - ▶ Developed computerized models to perform cost analysis of teacher salary range proposals.
 - ▶ Developed and executed an implementation plan for improving competitiveness and maintaining that standing over time.
- ▶ **San Jose Evergreen Community College District**, San Jose, California. Please contact Ms. Pauline Clarke, Director of Human Resources at (408) 223-6736. Significant accomplishments include:
- ▶ Developed and implemented a long range plan to update the salary administration program for improved internal decision-making.
 - ▶ Conducted salary surveys.
 - ▶ Provide continuous job analysis and re-classification support.
- ▶ **Columbia Willamette Valley Medical Center** , McMinnville, Oregon. Please contact Ms. Cheryl Gebhart, Director of Human Resources at (503) 435-6371. Significant accomplishments include:
- ▶ Developed and implemented a salary administration program which improved competitiveness from the 35th percentile to the 50th percentile (median) in two years while staying within budgetary constraints.
 - ▶ Designed, developed and implemented programs including a “pay-for-learning” program, consolidation of positions and “broad-banding of salary ranges, and a total remuneration approach to establishing salary ranges.
- ▶ **Linn-Benton Community College, Oregon** . Please contact Ms. Lauren Allender, Director of Human Resources at (541) 917-4431.
- ▶ Designed and implemented a comprehensive salary administration that for classified, then management, that included skill-based career ladders. Developed a 4-level skill ladder for staff professionals linked to learning and professional development. Implement a private-industry style of salary ranges to be competitive in an aggressive labor market.

**Resume of
Vance B. Jacobson**

MBA Degree
BA Degree in Finance
University of Oregon

Mr. Jacobson is a senior member and co-founder of Jacobson, Betts & Company. He has over sixteen years experience as a consultant, specializing in total compensation systems, organization design, and performance and productivity management systems. His industry experience is concentrated in health care, utilities, transportation, government, education, retail, and light and high technology manufacturing.

Prior to establishing this firm, Mr. Jacobson held positions as a Principal of an international consulting firm, a Partner of a regional consulting firm, and senior consultant with a national accounting firm. In each, he held increasingly responsible positions, directing the compensation and organization development aspects of the firm's practice. His industry experience includes retail trade as the President of a specialty operation and in transportation where he managed the Salary Administration and Training and Development functions for a major railroad.

His specific background includes substantial project experience in the development of job evaluation and compensation systems, incentive and variable compensation programs which include domestic and international positions, team oriented incentive plans rewarding productivity-improvement, deferred compensation, salary surveys, and performance measurement systems. He is particularly well known for his work in designing complex organization structures, analyzing job content, analyzing work distribution and staffing, job design, the effectiveness of organizations at delivering services, and linking compensation to total quality improvement programs.

Mr. Jacobson is the author of the firm's proprietary job measurement technology, **JOBMEAS™**, which is well known for its capabilities in the pay determination process. JOBMEAS is a point-factor system for assigning relative value to the content of jobs and is utilized extensively by organizations ranging in size from sixty to ten thousand employees.

Mr. Jacobson has provided expert testimony and has made numerous presentations to business groups in the areas of compensation and organization improvement. His publications have appeared in professional journals and have been used as training materials.

JB JB JB



Jacobson, Betts & Company
Seattle, Washington *USA*

IV PROJECT SCHEDULE AND FEES

A. Fee Proposal

Our professional fees consider the number of hours spent on the assignment extended by the established rates for the consultant and/or the type of service. Out-of-pocket expenses for communications, and clerical support are billed based on actual cost and are in addition to professional fees. We generally do not bill for travel time unless called for special conferences. We generate statements on a monthly basis during the course of the project as time and expenses actually occur, with net-end-of-month terms.

Professional Fees and Related Expenses:

| <u>Task</u> | <u>Hours</u> | <u>Average Rate</u> | <u>Fee</u> |
|-------------------------|--------------|-------------------------|---------------|
| A through I | 372 | \$120.00 | \$44,640 |
| Out-of-Pocket Expenses | | | \$ 1,600 |
| Administrative Expenses | | | <u>\$ 300</u> |

Total Project Cost, with 57 class descriptions:

\$46,500

Out-of-pocket expenses include travel from our Dallas office and are billed based on actual cost above and beyond professional fees. We will do everything possible to minimize travel by seeking discount airfares and special lodging rates and combining trips with other clients.

Extra services outside the scope of the project requested by the Council will be billed at \$120.00 per productive hour.

B. Project Schedule

The project is bid at 372 consultant hours over a span of about 3 calendar months. If fewer hours are required, you will only be billed for the lower amount.

If we begin on or about July 26, 2004, for example, we **guarantee** the Council with **results** that are ready for implementation by October 30, 2004.

This represents a "worse-case scenario" with more time and expenses budget than we hope would be sufficient to complete the project.

JB JB JB



Jacobson, Betts & Company
Seattle, Washington *USA*

The SALPLAN Model.

Let's take a look...

SALPLAN Technical Report

JOBMEAS Data

Range Data

| Position | JOBMEAS Codes | | | | | | | | | | Job Pay | | Salary Range | | |
|-------------------|---------------|----|----|----|----|-------|-------|------|--------|------|---------|--------|--------------|-------|-------|
| | MR | PR | HR | WE | AC | Value | Range | Min. | Midpt. | Max. | Min. | Midpt. | Max. | | |
| Principal Planner | E3 | 8 | A2 | 1 | C2 | 7 | C1 | 1 | C3 | 8 | 2,409 | 26 | 22.68 | 27.00 | 30.78 |
| Senior Planner | E2 | 7 | A2 | 1 | C1 | 6 | B3 | 1 | B3 | 7 | 2,237 | 24 | 20.43 | 24.32 | 27.73 |
| Planner-entry | D3 | 4 | A2 | 1 | B2 | 4 | B1 | A | B2 | 4 | 1,626 | 18 | 14.83 | 17.66 | 20.13 |

SALPLAN Administrative Report

| Dept. Ctr. | Cost | Position | Incumbent | Pay Range | Salary Range | | | Ee's Rate | Midpt. Ratio | Ext. Pos. | Exper. Algn. | Salary Adj. |
|------------|------|--------------------|-------------------|-----------|--------------|--------|-------|-----------|--------------|-----------|--------------|-------------|
| | | | | | Min. | Midpt. | Max. | | | | | |
| CD | 6190 | Director of CD | Smith, John | 30 | 27.95 | 33.27 | 38.59 | 33.00 | 99 | 50 | 50 | 3% |
| PW | 7300 | Chief Engineer | Albertson, Olivia | 28 | 25.17 | 29.97 | 34.77 | 26.60 | 89 | 40 | 55 | 8% |
| CD | 8001 | Principal Planner | Lavelle, Bradford | 26 | 22.68 | 27.00 | 31.32 | 23.00 | 85 | 35 | 45 | 8% |
| PW | 8001 | Maintenance Supv. | Palmer, Mary | 24 | 20.43 | 24.32 | 28.22 | 23.00 | 95 | 48 | 50 | 4% |
| FIN | 8001 | Accountant | Lehman, Emily | 22 | 18.31 | 21.79 | 25.28 | 19.50 | 89 | 42 | 50 | 6% |
| PW | 8004 | Sr. Engineer Tech. | Archer, Ann | 18 | 14.83 | 17.66 | 20.49 | 19.00 | 108 | 60 | 50 | 3% |
| PW | 8004 | Equipment Oper. | Nguyen, Sang | 16 | 13.94 | 16.60 | 19.26 | 14.50 | 87 | 35 | 40 | 5% |

Where they are! →
 ...they should be! →
 ...the proper adjustment.

SALPLAN Summary Report

| | | | |
|------------------------|--------------|--------------------------------|--------------|
| Average Rate: | \$19.30 | Proposal Period: | Fiscal 2003 |
| Full-Time Employees: | 331.8 | Proposed Average Rate Change: | 5.0% |
| Current Salary Budget: | \$13,340,000 | Proposed Salary Budget Change: | \$667,100 |
| ... at Market Median: | \$14,150,000 | Proposed New Salary Budget: | \$14,007,000 |
| Competitive Position: | 45 | ... Allocated to Merit: | \$362,000 |
| Ee Length of Service: | 4.5 | ... Allocated to Pay Equity: | \$305,000 |

Exhibit 2

Jacobson, Betts & Company

JOBMEAS™

System of Job Evaluation

Job evaluation refers to the techniques used to determine the relative importance of individual positions for pay determination purposes. Job evaluation techniques are used by organizations to enhance and stabilize judgements about the salary treatment of individual positions. The purpose of job evaluation is ensure that pay relationships are internally equitable, using a common, bias-free measuring stick.

A. Overview of JOBMEAS™

The JOBMEAS™ system of evaluation provides a sophisticated, yet practical, and easy-to-understand technique for determining pay relationships among jobs. The system is recognized for its ability to be applied to virtually all jobs in all occupational categories in a manner which is equitable and reflective of the work values that both employers and employees have.

JOBMEAS™ uses a point-factor evaluation technique which is specifically designed to treat large numbers of positions equitably in the pay determination process. The system enables direct comparisons to be made among all jobs in quantitative terms through the application of a set of guide charts defining five broad areas of measure. Each chart contains two dimensions describing the broad area of measure. Each dimension contains a series of definitions, arranged in hierarchical order. Job content facts are compared to the definitions, producing a numerical value which then becomes the basis for determining the relative value of positions to each other and the salary treatment.

JOBMEAS™ is the product of over 15 years of research, application, and updating. The factors, or broad areas of measurement, reflect modern thought in job engineering, recruitment, and management and employee value systems. JOBMEAS™ is designed to be a management tool; one that consistently facilitates pay determination decisions with regard to the mission, philosophy, and needs of the organization.

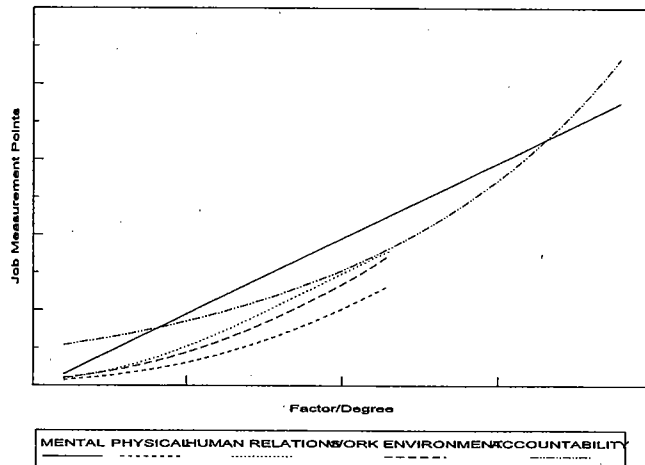
B. Critical Dimensions for Effectiveness

The JOBMEAS™ system of evaluation achieves the elements which are critical to a sound measurement technique:

- ✓ **Enhancement of the judgement process.** JOBMEAS™

provides a language and framework for defining jobs and making valid comparisons by translating certain job content components to the measurement technique.

- ✓ **Stabilization of the judgement process.** JOBMEAS™ helps assure high inter-rater reliability by providing discipline, clear measures, and controls to the process.
- ✓ **Optimal weighing of measurement areas.** The guide charts are weighed to ensure that the relative worth of jobs, as measured in points, accurately reflects the relative importance of the individual factors to the "whole" job. Optimal weighing also maximizes the ability of the job point value to project salary levels.



- ✓ **Fairness.** JOBMEAS™, by way of the design and quantifying of the guide charts, provides assurance that the job point value is reflective of its internal relative worth to the organization.

C. The Measurement Areas

The JOBMEAS™ system of evaluation contains five distinct job measurement guide charts:

- I. **MENTAL REQUIREMENTS.** The body of knowledge required for the job and problem solving, or difficulty and complexity in applying knowledge to work situations.
 - A. **Learning Development,** or level of knowledge, considers

the level, breadth and complexity of knowledge. Knowledge typically comes from formal education, experience, and/or aptitude. Key considerations to rating knowledge are "depth" which refers to thoroughness, and "diversity" which considers the comprehensiveness, scope, and variety (e.g., different fields of knowledge).

- B. **Problem Solving Challenges**, refers to the type of thinking necessary to solve problems. It represents the application of knowledge to solve work assignment problems. Key considerations are the amount of independent reasoning and judgement used, the technical depth, the conversion of technical solutions to tactical and strategic actions, the time frame governing the impact of the solution, and diversity of problems solved.

II. **PHYSICAL REQUIREMENTS.** The learned physical skills and physical effort demands when performing work.

- A. **Learned Physical Skills**, or the coordinative and manipulative skills, considers the time required to learn movements, speed-precision-timing-balance needed for competency, and variety of body/limb movement required.
- B. **Physical Effort**, considers the actual physical work expended. Key requirements to understand are whether the effort involves walking, standing, lifting, or carrying; and whether effort is occasional, frequent, or sustained.

III. **HUMAN RELATIONS REQUIREMENTS.** The important human relations skills and the scope of contacts required to complete work assignments.

- A. **Human Relations Skill**, refers to the skills required to deal with others. Skill relates to the degree of human relations challenges predominant in the job. Considerations include the need for persuasiveness, exchange of complex ideas to lay people, teaching or training skills, public speaking, and motivational and counselling skills.
- B. **Scope of Contacts**, refers to the breadth and diversity of individuals and groups with whom the job incumbent must deal in order to accomplish the job's accountabilities.

IV. **WORK ENVIRONMENT.** Elements in the work setting that make

it both difficult to complete work and disagreeable.

- A. **Performance Environment**, refers to the "extraordinary" job demands that make it difficult to complete work. Elements of the work setting include deadline pressure, interruptions in work flow, changing schedules, requirements for professional renewal, and unpredictable time demands.
- B. **Working Conditions**, is defined as the locational factors which make the job disagreeable or dangerous. Key considerations for this element are safety and health issues.

V. **ACCOUNTABILITY**. The level of accountability and professional development, as well as, the scope and magnitude of impact on the organization's functioning.

- A. **Level of Accountability**, measures the level of accountability for work results, professional development, and the hierarchical placement of the position within the organization.
- B. **Impact**, refers to the degree to which a job directly or indirectly influences end results--the delivery of final products or services to the customer. Impact is further defined by the level or "magnitude" of influence, then within a level, the role the job plays by providing information/advice, by participating, or by directing/controlling the end result.

JOBMEAS™ does not require the evaluator to directly compare or match jobs. Job content is matched to each guide chart, one at a time and independently, thus enabling a complete and objective evaluation.

D. JOBMEAS™ and On-going Decisions

The **JOBMEAS™** system of evaluation is suitable for manual and automated use. The system is accompanied by computerized tools that provide a historical record of job evaluation judgements, assist with budgeting and related financial analyses, facilitate specialized reports, and assist with "what if" problem solving.

JOBMEAS™ works! The system is easy to learn and administer, it serves as a management tool, and it receives strong employee support.

JB JB JB



Jacobson, Betts & Company
Seattle, Washington *USA*

Sample

Position Description

| | |
|--|------------------|
| Position: Administrative Services Technician | Position Number: |
| Department/Site: Community Education | FLSA: Non-exempt |
| Evaluated by: | Salary Grade: |

Summary

Provides a variety of clerical, technical, and secretarial support to an external relations-oriented department where most business activity is conducted with prospective students, businesses and community customers, contributors, special populations, and/or the media. Organizes and carries out duties to support efficient processing of documents, external communications, and distribution of published materials.

Distinguishing Career Features

Administrative Services Technician refers to a multi-level career path for positions that perform a range of general clerical, technical, and secretarial duties. While other career paths may be more focused, e.g., administrative secretarial or student services transactions, the Administrative Services Technicians perform in a variety of 'generalist' capacities. Advancement to this particular position requires a demonstrated ability to work with external customers, prepare professional correspondence and publications suitable for external mass distribution, compile presentations, and organize special events. Advancement from this level of Technician is possible based on need and competence in performing research, assuming additional financial management and reporting responsibility.

Essential Duties and Responsibilities

Clerical/Secretarial Support

- Receives walk-in guests and telephone inquiries from a variety of individuals. Initiates and receives telephone calls, provides information and resolves matters as appropriate, or routes calls as necessary.
- Provides information to visitors and/or other interested parties, and provides routine external liaison in one or more of a range of contexts.
- Coordinates and schedules meetings as directed. Prepares schedules and informs participants, confirming dates and times. Makes travel arrangements as directed.
- Inputs information into relational databases, spreadsheets, or word processing tables for use in mailings, call lists, and registration. Updates information and maintains data files. Accesses databases to extract information supporting special requests or research.
- Prepares, assembles, maintains and updates calendars, schedules, lists, manuals, directories, and handbooks for distribution and use by others. Prepares informational packets for others to use in presentations and meetings.
- Composes routine correspondence and documents from rough drafts or verbal instructions using modern word processing software. May take and transcribe dictation.
- Prepares agreements and contracts for services used by and/or provided by the division. Processes contract documents for approval and distributes executed contracts.
- Sets up and maintains departmental files, records, and archives. Processes incoming and outgoing mail. Designs forms, templates, and other materials to enhance departmental efficiency and intradepartmental communications.

Community Education

- Serves as point-of-contact for the department by providing information, monitoring schedules and time lines, arranging for logistics support to instructors, trainers and attendees/students.
- Generates and distributes Community Education class and program rosters at District campuses and other sites.
- Assists with the class setup process by arranging for facilities, classroom locations, and instructors from existing rosters. Assists instructors with obtaining course outlines and reproducing instructional materials. Explains registration procedures.
- Arranges for direct sale and may transport textbooks and media equipment to course sites. Sells or sets up procedures for textbook and other instructional material sales.
- Sets up on-site registration, coordinating with Admissions and Records for support and/or staffing. Distributes registration forms to instructors and attendees. Maintains seminar registration files in organized manner for quick staff referral.
- Compiles a variety of data on Community Education classes and other activities. Assigns course codes. Monitors class enrollment, recommending necessary additions or cancellations, and entering corrected data into databases. Processes forms depicting changes to master class schedules. Notifies students or attendees of cancelled classes.
- Confers with and negotiates contract instructor salaries with less-than-minimum enrollments in Community Education classes, using established cost breakeven rules.
- Prepares work flow diagrams, calendars, checklists, and databases to track multiple course offerings, instructor availability, and optimize the use of facilities and classrooms. Prepares periodic activity reports of course, instructor, and attendee activity.
- Assists with design and production of course program promotional advertisements in various printed and electronic media. Designs and composes promotional flyers and other announcements.
- May update web pages that promote Contract Education programs, services, and image using optimal designs and layouts.

Financial Processes

- Prepares and processes purchase orders, verifying available funds and coding to proper budget category. Follows-up on approved purchases for delivery status, costs, and in the case of project-oriented services, work in progress and outstanding balances.
- Reviews, codes, and processes requisitions, invoices, expense forms, claims, and payroll timesheets, verifying amounts, hours, and accounts. Records information that supports faculty workload computations and stipend payments.
- Assists with setup and maintenance of departmental budgets. Using spreadsheets and accessing information from databases, reviews actual-versus-budgeted accounts, interprets and notifies management of status. May initiate account transfers. Monitors the distribution of funding to comply with the provisions of grants and special accounts. Prepares for final review, and distributes reports to external oversight agencies.
- Receives and accounts for registration fees, tickets, and purchases of instructional materials. Prepares bank deposits. Follows up on accounts receivable, including bad checks, for collection.
- May recruit, select, schedule and orient student, temporary, and volunteer help.
- Performs other duties as assigned that support the overall objective of the position.

Qualifications

Knowledge and Skills

The position requires working knowledge of the practices and techniques used in community-based education. Requires a working knowledge of office practices,

procedures and equipment, including filing systems, receptionist and telephone techniques, and letter and report writing. Requires a working knowledge of those activities associated with accounting, budget and payroll transaction processing, and statistical record keeping. Requires a working knowledge of personal computer-based software programs that support this level of work, including but not limited to word processing, spreadsheet, presentation graphics, desktop publishing, and database software used in education. Requires business mathematics skills to compute sums and statistics. Must be skilled in using and troubleshooting various standard office machines. Requires well-developed skill using the English language, grammar, spelling, punctuation, proofreading/editing, to prepare professional correspondence. Requires sufficient human relations skills to make informal group presentations, present a positive image of the College, convey technical information to others, and use patience in dealing with a diverse population.

▪ **Abilities**

Requires the ability to perform all of the duties of the position efficiently and in an open environment with interruptions and distractions. Must be able to perform clerical and secretarial work with speed and accuracy. Must be able to learn, interpret, explain and apply knowledge of District and department organization, operations, programs, functions and special department terminology when performing assignments. Requires the ability to plan, organize and prioritize work in order to meet schedules and timelines. Requires the ability to work cooperatively with staff, current and prospective students, external organizations, and the public using patience and courtesy. Requires the ability to use a personal computer to produce correspondence, promotional materials, layouts, and conduct research. Requires the ability to maintain confidentiality of private and sensitive information. May require the ability to perform work assignments at all College locations.

▪ **Physical Abilities**

The position incumbent must be able to function indoors in an office environment engaged in work of primarily a sedentary nature.

Requires ambulatory ability to sit for extended periods of time, to utilize microcomputers and peripheral equipment, accomplish other desktop work, and to move to various campus locations. Requires the ability to use near vision to read printed materials. Requires auditory ability to carry on conversations in person and over the phone. Requires the ability to retrieve work materials from overhead, waist, and ground level files. Requires manual and finger dexterity to write, use a pointing device and keyboard at an advanced rate, operate microcomputer, and to operate other standardized office equipment, almost constantly requiring repetitive motions.

▪ **Education and Experience**

The position typically requires college-level coursework in a general business discipline, or equivalent, and four years of progressive experience in a training and development or admissions area. Additional higher education may substitute for some experience.

▪ **Licenses and Certificates**

Requires a valid driver's license.

▪ **Working Conditions**

Work is performed indoors where minimal safety considerations exist.