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STAFF REPORT

Meeting Date: October 14, 2020
 Prepared By: Kevin Lee, District Director
 Agenda Item: 11.2
 Title: Classification Study Final Reports and Recommendations

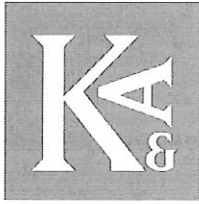
RECOMMENDATION:

That the Board **adopt and approve** the title changes, reclassifications, and updated job descriptions as presented by Koff and Associates.

BACKGROUND:

Beginning in July 2020, Koff and Associates conducted a comprehensive Classification Study for the District. The goal of the classification study is to assist the District in developing an up-to-date and current classification plan and classification descriptions that meet the needs of the District with regards to recruitment and retention of qualified staff. The current classifications and the recommended changes to these based on the comparator agencies are shown below. The current classification descriptions can be reviewed at <http://www.banninglibrarydistrict.org/hr.asp>. The full report is attached.

Current Classifications	Proposed Classifications
<ul style="list-style-type: none"> • District Director • Circulation Manager • Library Administrator • Librarian I • Librarian II • Adult Literacy Coordinator • Historian • Library Assistant I • Library Assistant II • Library Assistant III • Library Aide • Custodian/Maintenance Worker • Administrative Assistant • Cataloger • Computer Technician • Security Guard 	<ul style="list-style-type: none"> • District Director • Library Manager • Administrative Services Manager • Librarian • Historian • Library Technician • Library Assistant • Library Clerk • Library Aide • Custodian



October 7, 2020

Volume I Classification Study Final Report

Banning Library District

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October 7, 2020

Mr. Kevin Lee, District Director
Banning Library District
21 West Nicolet Street
Banning, CA 92220

Dear Mr. Lee:

Koff & Associates is pleased to present the final classification report for the study of eleven (11) positions in seven (7) classifications at the BANNING LIBRARY DISTRICT ("Banning"). Volume I documents the classification study process and provides recommendations for the classification plan, allocations of individual positions for all Banning employees, and class specifications. Volume II, to be sent under separate cover, documents the market compensation survey, findings, and recommendations.

This first volume incorporates a summary of the study's multi-step process, which included results of written Position Description Questionnaires, interviews with employees and management, and employee review and comments in the form of draft class descriptions, and class allocation recommendations.

We would like to thank you for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with you and we look forward to future opportunities to provide you with professional assistance.

Very truly yours,

Mike Harary

Mike Harary
Project Manager



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EXECUTIVE SUMMARY

Background

Beginning in July 2020, Koff & Associates (“K&A”) conducted a comprehensive Classification Study for the Banning Library District (“Banning”). All classification findings, recommendations, and options for implementation are presented in this report.

This classification review process was precipitated by:

- The concern of the Board of Trustees, management, and District employees that employees be recognized for the level and scope of work performed and that they be allocated to appropriate classification levels and classification titles;
- The goal to ensure class descriptions reflect current assignments, programs, responsibilities, and technologies; and
- The desire to update Banning’s classification plan to support Banning’s business and operational needs for the foreseeable future.

The goal of the classification study is to assist Banning in developing an up-to-date and current classification plan and classification descriptions that meet the needs of Banning with regards to recruitment and retention of qualified staff.

CLASSIFICATION STUDY GOALS

The goals and objectives of the classification portion of the study were to:

- Obtain detailed information regarding each position through a variety of techniques, including written Position Description Questionnaires (PDQs) and interviews with employees and management;
- Prepare an updated classification plan, including recommended class descriptions and position allocations that recognize the scope and level of the various classes and positions, and is perceived to be equitable by management and employees alike;
- Provide class descriptions and other documentation that includes information required for compliance with the Americans with Disabilities Act (ADA) and appropriate qualifications, including knowledge, skills, and other requirements that are job-related and meet other legal guidelines; and
- Provide sufficient documentation to allow Banning to maintain the classification system on a regular basis.



CLASSIFICATION STUDY PROCESS

The classification study procedures were as follows:

- An initial meeting was held with the District Director to clarify study scope, objectives, processes, and deliverables.
- An orientation meeting was held with Banning’s employees to meet consultant staff involved with the project, clarify study objectives and procedures, answer questions, and distribute the PDQs.
- After the PDQs were completed by employees and reviewed by management and consultant staff, interviews were conducted with employees and management.
- Following the analysis of the classification information gathered, draft class concepts, specifications, and position allocations were developed for management and employee review.
- After resolution of issues, wherever possible, including additional contacts with employees and management to gain details and clarification, appropriate modifications were made to the draft specifications and allocations and this final report was prepared.

CLASSIFICATION CONCEPTS

Positions vs. Classifications

“Position” and “Classification” are two terms that are often used interchangeably but have very different meanings. As used in this report:

- A position is an assigned group of duties and responsibilities performed by one person. A position can be full-time, part-time, regular or temporary, filled or vacant. Often the word “job” is used in place of the word “position.”
- A “classification” or “class” may contain only one position or may consist of a number of positions. When you have several positions assigned to one class, it means the same title is appropriate for each position; the scope, level, duties, and responsibilities of each position assigned to the class are sufficiently similar (but not identical); the same core knowledge, skills, abilities, and other requirements are appropriate for all positions; and the same salary range is equitable for all positions in the class.

The description of a position often appears as a working desk manual, going into detail regarding work process steps, while a class description emphasizes the general scope and level of responsibilities, plus the knowledge, skills, abilities, and other requirements for successful performance.

When positions are classified, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of



work performed. Positions are thus evaluated and classified on the basis of such factors as knowledge, skills, and abilities required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), and the impact of the position on the organization and working conditions.

The Relationship Between Classification and Compensation

Classification and the description of the work and the requirements to perform the work are separate and distinct from determining the worth of that work in the labor market and to the organization. While recommending the appropriate compensation for the work of a class depends upon an understanding of what that work is and what it requires (as noted above), compensation levels are often influenced by two factors:

- The external labor market; and
- Internal relationships within the organization.

Compensation findings and recommendations for Banning are covered in a separate report.

The Purpose of Having a Classification Plan

A position classification plan provides an appropriate basis for making a variety of human resources decisions such as the:

- Development of job-related recruitment and selection procedures;
- Clear and objective appraisal of employee performance;
- Development of training plans and succession planning;
- Design of an equitable and competitive salary structure;
- Organizational development and the management of change; and
- Provision of an equitable basis for discipline and other employee actions.

In addition to providing this basis for various human resources management and process decisions, a position classification plan can also effectively support systems of administrative and fiscal control. Grouping of positions into an orderly classification system supports planning, budget analysis and preparation, and various other administrative functions.

Within a position classification plan, job classifications can either be broad (containing a number of positions) or narrow (emphasizing individual job characteristics). Broad job classifications are indicated when:

- Employees can be hired with a broad spectrum of knowledge, skill, and/or academic preparation and can readily learn the details of the District, the department, and the position on-the-job; or
- There is a need for flexibility of the assignment within a department or an organization due to changing programs, technologies, or workload.



Individualized job classifications are indicated when:

- There is an immediate need to recruit for specialty knowledge and skills;
- There is a minimum of time or capability for on-the-job training; or
- There is an organizational need to provide for specific job recognition and to highlight the differences between jobs.

Most classification plans are a combination of these two sets of factors, and we have chosen the middle ground in this study as being most practicable in the District’s changing environment and service delivery expectations, as well as being in line with the District’s strategic plan. This approach resulted in recommendations to retitle classifications to reflect current responsibilities more accurately or use more contemporary titles (e.g. “Circulation Manager” to “Library Manager”). Detailed allocation recommendations are found in Appendix I of this report.

Classification Descriptions

In developing the new and revised classification descriptions for all positions, the basic concepts outlined in the previous pages were utilized. The recommended class descriptions are included in Appendix II of this report.

As mentioned earlier, the class descriptions are based upon the information from the written PDQs completed by each employee, the individual and group classification interviews, and from information provided by employees and managers during the review processes. These descriptions provide:

- A written summary documenting the work performed and/or proposed by the incumbents of these classifications;
- Distinctions among the classes; and
- Documentation of requirements and qualifications to assist in the recruitment and selection process.

Just as there is a difference between a position and a class, there is also a difference between a position description and a class description. A position description, often known as a “desk manual”, generally lists each duty an employee performs and may also have information about how to perform that duty. A class description normally reflects several positions and is a summary document that does not list each duty performed by every employee. The class description, which is intended to be broader, more general, and informational, is intended to indicate the general scope and level of responsibility and requirements of the class, not detail-specific position responsibilities.

The sections of each class description are as follows:

Title: This should be brief and descriptive of the class and consistent with other titles in the classification plan and the occupational area.



- The title of a classification is normally used for organization, classification, and compensation purposes within the District. Often working titles are used within a department to differentiate an individual. All positions have a similar level of scope and responsibility; however, the working titles may give assurance to a member of the public that they are dealing with an appropriate individual. Working titles should be authorized by the District Director to ensure consistency within the District and across departmental lines.

Definition: This provides a capsule description of the job and should give an indication of the type of supervision received, the scope and level of the work and any unusual or unique factors. The phrase “performs related work as required” is not meant to unfairly expand the scope of the work performed, but to acknowledge that jobs change and that not all duties are included in the class specification.

Supervision Received and Exercised: This section specifies which class or classes provide supervision to the class being described and the type and level of work direction or supervision provided to this class. The section also specifies what type and level of work direction or supervision the class provides to other classes. This assists the reader in defining where the class “fits” in the organization and alludes to possible career advancement opportunities.

Class Characteristics: This can be considered the “editorial” section of the specification, slightly expanding the Definition, clarifying the most important aspects of the class, and distinguishing this class from the next higher-level in a class series or from a similar class in a different occupational series.

Examples of Typical Job Functions: This section provides a list of the major and typical duties, intended to define the scope and level of the class and to support the Qualifications, including Knowledge and Skills. This list is meant to be illustrative only. It should be emphasized that the description is a summary document, and that duties change depending upon program requirements, technology, and organizational needs.

Qualifications: This element of the description has several sections:

- A listing of the job-related knowledge and skills required to successfully perform the work. They must be related to the duties and responsibilities of the work and capable of being validated under the Equal Employment Opportunity Commission’s Uniform Guidelines on Selection Procedures. Knowledge (intellectual comprehension) and Abilities (acquired proficiency) should be sufficiently detailed to provide the basis for selection of qualified employees.
- A listing of educational and experience requirements that outline minimum and alternative ways of gaining the knowledge and abilities required for entrance into the selection process. These elements are used as the basic screening technique for job applicants.



- Licenses and/or certifications identify those specifically required in order to perform the work. These certifications are often required by an agency higher than the District (i.e., the State), and can therefore be appropriately included as requirements.

Physical Demands: This section identifies the basic physical abilities required for performance of the work. These are not presented in great detail (although they are more specifically covered for documentation purposes in the PDQs) but are designed to indicate the type of pre-employment physical examination (lifting requirements and other unusual characteristics are included, such as “finger dexterity needed to access, enter, and retrieve data using a computer keyboard”) and to provide an initial basis for determining reasonable accommodation for ADA purposes.

Environmental Conditions: These can describe certain outside influences and circumstances under which a job is performed; they give employees or job applicants an idea of certain risks involved in the job and what type of protective gear may be necessary to perform the job. Examples are loud noise levels, cold and/or hot temperatures, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, and other job conditions.

Fair Labor Standards Act

One of the major components of the job analysis and classification review is the determination of each classification’s appropriate Fair Labor Standards Act (FLSA) status, i.e., exempt vs. non-exempt from the FLSA overtime rules and regulations.

As we review position description questionnaires and notes from the interviews, we analyze each classification’s essential functions to determine FLSA status. There are three (3) levels for the determination of the appropriate FLSA status that are utilized and on which we base our recommendations. Below are the steps used for the determination of Exempt FLSA status.

Salary Basis Test: The incumbents in a classification are paid at least \$684 per week (\$35,568 per year), not subject to reduction due to variations in quantity/quality of work performed.

Exemption Applicability: The incumbents in a classification perform any of the following types of jobs:

- Executive: Employee whose primary duty is to manage the business or a recognized department/entity and who customarily directs the work of two or more employees. This also includes individuals who hire, fire, or make recommendations that carry weight regarding employment status. Examples: executive, director, owner, manager, supervisor.
- Administrative: Employee whose primary activities are performing office work or non-manual work on matters of significance relating to the management or business operations of the firm or its customers and which require the exercise of discretion and independent judgment. Examples: coordinator, administrator, analyst, accountant.



- **Professional:** Employee who primarily performs work requiring advanced knowledge/education and which includes consistent exercise of discretion and independent judgment. The advanced knowledge must be in a field of science or learning acquired in a prolonged course of specialized intellectual instruction. Examples: attorney, physician, statistician, architect, biologist, pharmacist, engineer, teacher.
- **Computer professional:** Employee who primarily performs work as a computer systems analyst, programmer, software engineer, or similarly skilled work in the computer field performing a) application of systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system functional specifications; b) design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specification; or c) design, documentation, testing, creation, or modification of computer programs based on and related to user or system design specifications; or a combination of the duties described above, the performance of which requires the same level of skills. Examples: system analyst, database analyst, network architect, software engineer, programmer.

Job Analysis: A thorough job analysis of the job duties must be performed to determine exempt status. An exempt position must pass both the salary basis and duties tests. The job analysis should include:

- Review of the minimum qualifications established for the job;
- Review of prior class descriptions, questionnaires, and related documentation;
- Confirmation of duty accuracy with management; and
- Review and analysis of workflow, organizational relationships, policies, and other available organizational data.

Non-exempt classifications work within detailed and well-defined sets of rules and regulations, policies, procedures, and practices that must be followed when making decisions. Although the knowledge base required to perform the work may be significant, the framework within which incumbents work is fairly restrictive and finite. (Please note the FLSA does not allow for the consideration of workload and scheduling when it comes to exemption status).

Finally, often times a classification performs both non-exempt and exempt duties, so we analyze time spent on each type of duties. If a classification performs mostly non-exempt duties (i.e. more than 50% of his or her time), then the classification would be considered non-exempt.



CLASSIFICATION FINDINGS AND RECOMMENDATIONS

Classification Structure and Allocation Factors

The proposed classification plan provides Banning with a systematic classification structure based on the interrelationship between duties performed, the nature and level of responsibilities, and other work-related requirements of the jobs.

A classification plan is not an inflexible, unchanging entity. Classification plans may be updated and revised by conducting classification studies that are organization-wide (review of all classifications and positions) or position-specific. The methodology used for both types of studies is the same, as outlined above.

For either type of study, when identifying appropriate placement of new and/or realigned positions within the classification structure, there are general allocation factors to consider. By analyzing these factors, the District will be able to change and grow the organization while maintaining the classification plan.

1. Type and Level of Knowledge and Skill Required

This factor defines the level of job knowledge and skill, including those attained by formal education, technical training, on-the job experience, and required certification or professional registration. The varying levels are as follows:

A. The entry-level into any occupational field

This entry-level knowledge may be attained by obtaining a high school diploma, completing specific technical course work, or obtaining a four-year or advanced college or university degree. Little to no experience is required.

B. The experienced or journey-level (fully competent-level) in any occupational field

This knowledge and skill level recognize a class that is expected to perform the day-to-day functions of the work independently, but with guidelines (written or oral) and supervisory assistance available. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee or an assistant when functioning in a lead capacity. Certifications may be required for demonstrating possession of the required knowledge and skills.

C. The advanced level in any occupational field

This knowledge and skill level is applied in situations where an employee is required to perform or deal with virtually any job situation that may be encountered. Guidelines may be limited and creative problem solving may be involved. Supervisory knowledge and skills are considered in a separate factor and should not influence any assessment of this factor.

2. Supervisory/Management Responsibility



This factor defines the staff and/or program management responsibility, including short- and long-range planning, budget development and administration, resource allocation, policy and procedure development, and supervision and direction of staff.

A. No ongoing direction of staff

The employee is responsible for the performance of his or her own work and may provide side-by-side instruction to a co-worker.

B. Lead direction of staff or program coordination

The employee plans, assigns, directs, and reviews the work of staff performing similar work to that performed by the employee on a day-to-day basis. Training in work procedures is normally involved. If staff direction is not involved, the employee must have responsibility for independently coordinating one or more programs or projects on a regular basis.

C. Full first-line supervisor

The employee performs the supervisory duties listed above, and, in addition, makes effective recommendations and/or carries out selection, performance evaluation, and disciplinary procedures. If staff supervision is not involved, the employee must have programmatic responsibility, including development and implementation of goals, objectives, policies and procedures, and budget development and administration.

D. Manager

The employee is considered management, often supervising through subordinate levels of supervision. In addition to the responsibilities outlined above, responsibilities include allocating staff and budget resources among competing demands and performing significant program and service delivery planning and evaluation. This level normally reports to the District Director.

E. Executive Management

The employee has total administrative responsibility for the District and reports to the Board of Trustees.

3. Supervision Received

A. Direct Supervision

Direct supervision is usually received by entry-level employees and trainees, i.e., employees who are new to the organization and/or the position they are filling. Initially under close supervision, incumbents learn to apply concepts and work procedures and methods in assigned areas of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As



experience is gained, assignments become more varied and are performed with greater independence.

B. General Supervision

General supervision is usually received by the experienced and journey-level employees, i.e., employees who have been in a position for a period of time and have had the opportunity to be trained and learn most, if not all, duties and responsibilities of the assigned classification. Incumbents are cross-trained to perform the full range of technical work in all of the areas of assignment.

At this experienced-level, positions exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Incumbents have some flexibility in the selection of steps and timing of work processes.

Journey-level positions receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

C. General Direction

General direction is usually received by senior level or management positions. Work assignments are typically given as broad, conceptual ideas and directives, and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

D. Administrative and Policy Direction

Administrative direction is usually received by executive management classifications. The incumbent is accountable for accomplishing District-wide planning and operational goals and objectives within legal and general policy and regulatory guidelines. The incumbent is responsible for the efficient and economical performance of the organization's operations.

4. Problem Solving

This factor involves analyzing, evaluating, reasoning, and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.

A. Structured problem solving



Employees learn to apply concepts and work procedures and methods in assigned areas of responsibility and to resolve problems and issues that are specific, less complex, and/or repetitive. Exceptions or changes in procedures are explained in detail as they arise.

B. Independent, guided problem solving

Work situations require making independent decisions among a variety of alternatives; however, policies, procedures, standards, and regulations and/or management are available to guide the employee towards problem resolution.

C. Application of discriminating choices

Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate concepts, guidelines, references, laws, regulations, policies, and procedures to resolve diverse and complex problems and issues.

D. Creative, evaluative, or critical thinking

The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution.

5. Authority for Making Decisions and Taking Action

This factor describes the degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and supervisory or managerial guidance, and the consequence or impact of such decisions are considered within this factor.

A. Direct, limited work responsibility

The employee is responsible for the successful performance of his or her own work with little latitude for discretion or decision-making. Work is usually supervised while in progress and fits an established structure or pattern. Direct supervision is readily available.

B. Decision-making within guidelines

The employee is responsible for the successful performance of their own work, but able to prioritize and determine methods of work performance within general guidelines. Supervision is available, although the employee is expected to perform independently on a day-to-day basis. Emergency or unusual situations may occur but are handled within procedures and rules. Impact of decisions is normally limited to the work unit, project, or program to which assigned.

C. Independent action with focus on work achieved



The employee receives assignments in terms of long-term objectives, rather than day-to-day or weekly timeframes. Broad policies and procedures are provided, but the employee has latitude for choosing techniques and deploying staff and material resources. Impact of decisions may have significant program or District-wide service delivery and/or budgetary impact.

D. Decisions made within general policy or elected official guidance

The employee is subject only to the policy guidance of elected officials and/or broad regulatory or legal constraints. The ultimate authority for achieving the goals and objectives of the District are with this employee.

6. Interaction with Others

This factor includes the nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.

A. Exchange of factual information

The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public. Strained situations may occasionally occur, but the responsibilities are normally not confrontational.

B. Interpretation and explanation of policies and procedures

The employee is required to interpret policies and procedures, apply and explain them, and influence the public or others to abide by them. Problems may need to be defined and clarified and individuals contacted may be upset or unreasonable. Contacts may also be made with individuals at all levels throughout the District.

C. Influencing individuals or groups

The employee is required to interpret laws, policies, and procedures to individuals who may be confrontational or to deal with members of professional, business, community, or other groups or regulatory agencies as a representative of the District.

D. Negotiation with organizations from a position of authority

The employee often deals with the General Manager, elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of the District, provide policy direction, and/or negotiate solutions to difficult problems.

7. Working Conditions/Physical Demands

This factor includes specific physical, situational, and other factors that influence the employee's working situation.

A. Normal office or similar setting



The work is performed in a normal office or similar setting during regular office hours (occasional overtime may be required but compensated for). Responsibilities include meeting standard deadlines, using office and related equipment, lifting materials weighing up to 25 pounds, and communicating with others in a generally non-stressful manner.

B. Varied working conditions with some physical or emotional demands

The work is normally performed indoors, but may have some exposure to noise, heat, weather, or other uncomfortable conditions. Stand-by, call back, or regular overtime may be required. The employee may have to meet frequent deadlines, work extended hours, and maintain attention to detail at a computer or other machinery, deal with difficult people, or regularly perform moderate physical activity.

C. Difficult working conditions and/or physical demands

The work has distinct and regular difficult demands. Shift work (24-7 or rotating) may be required; there may be exposure to hazardous materials or conditions; the employee may be subject to regular emergency callback and extended shifts; and/or the work may require extraordinary physical demands.

Based on the above factors, in the maintenance of the classification plan when an employee is assigned an additional duty or responsibility and requests a change in classification, it is reasonable to ask:

- What additional knowledge and skills are required to perform the duty?
- How does one gain this additional knowledge and skills – through extended training, through a short-term seminar, through on-the-job experience?
- Does this duty or responsibility require new or additional supervisory responsibilities?
- Is there a greater variety of or are there more complex problems that need to be solved as a result of the new duty?
- Does the employee have to make a greater variety of or more difficult decisions as a result of this new duty?
- Are the impacts of decisions greater because of this new duty (effects on staff, budget, District-wide activities, and/or relations with other agencies)?
- Are guidelines, policies, and/or procedures provided to the employee for the performance of this new duty?
- Is the employee interacting with internal and external stakeholders more frequently or for a different purpose as a result of this new assignment?
- Have the working or physical conditions of the job changed as a result of this new assignment?

The analysis of the factors outlined above, as well as the answers to these questions, were used to determine recommended classifications for all Banning employees. The factors above will also help to guide the placement of specific positions to the existing classification structure and/or revision of the entire classification structure in the future.



Classification Allocation Recommendations

Class descriptions were created for all of Banning’s positions to reflect current duties and responsibilities, and properly reflect the required knowledge, abilities, and skills.

When evaluating the allocation of positions, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are evaluated and classified on the basis of such factors as knowledge and skill required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), the impact of the position on the organization, and working conditions.

Furthermore, it is necessary to: (i) identify the duties incumbents are currently being required to perform; (ii) determine if those duties are captured in the current classification description; and (iii) identify the percentage of duties being performed, if any, which are outside of the current classification.

Title Change

One recommendation includes changing the titles for three (3) Banning classifications.

Table 1. Title Change Recommendations

Current Classification Title	Proposed Classification Title
Library Administrator	Administrative Services Manager
Library Assistant I	Library Assistant
Circulation Manager	Library Manager

Title changes are recommended to reflect the level and scope more clearly being performed, to consolidate work into broader categories that could be used District-wide, as well as to establish consistency with the labor market and industry standards. Any compensation recommendations (detailed in Volume II) are not dependent upon a new title, but upon the market value as defined by job scope, level and responsibilities, and the qualifications required for successful job performance. All recommended position allocations are listed in Appendix I.

Reclassification

Reclassification recommendations are made for positions that are working out of class due to level and scope of work and/or job functions that have been added to or removed from those positions over time.

The study resulted in three (3) positions to be reclassified, as noted in the table below. These recommendations are based on the individual positions interviewed.



Table 2. Reclassification Recommendations

Current Classification Title	# of Incumbents	Proposed Classification Title
Library Assistant I	1	Library Technician
Library Assistant II	1	Library Clerk
Library Assistant III	1	Library Clerk

CONCLUSION

The revised classification descriptions serve as a general description of the work performed and provide a framework of the expectations of each position for the employee. Requests for the addition of new positions and classifications and/or reclassification of an existing position should follow established District policies and procedures. Any decisions related to the addition of new positions and classifications, reclassification of an existing position, and promotion of an existing position, will depend on the needs and resources of the District and the availability of work, as well as the ability of existing positions to meet the qualifications of and perform the duties of the higher-level class.

Finally, as mentioned previously, a classification plan is not a static, unchanging entity. The classification plan should be reviewed on a regular, on-going basis and may be amended or revised as required.

It has been a pleasure working with Banning Library District on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

Respectfully submitted by,
Koff & Associates

Mike Harary

Mike Harary
Project Manager

Appendix I

Recommended Position Allocations

Appendix II

New Classification Descriptions

Banning Library District
Draft Classification Allocation Listing
As of September 8, 2020

Last Name	First Name	Current Classification Title	Recommendation Classification Title	Recommendation Action	Consultant Comments
Lee	Kevin	District Director	District Director	No Change	Position is properly classified.
Ramos	Francisco	Historian	Historian	No Change	Position is properly classified.
Vigil	Khiabet	Library Aide	Library Aide	No Change	Position is properly classified.
Moore	Toni	Library Aide	Library Aide	No Change	Position is properly classified.
Bird	Melinda	Custodian	Custodian	No Change	Position is properly classified.
Reed	Danny	Library Assistant III	Library Clerk	Reclassification	Reclassification to reflect industry standard. Primary duties are serving at the Circulation Desk, checking books in and out, processing fines and fees and library cards.
Wiggins	Darnise	Library Assistant II	Library Clerk	Reclassification	Reclassification to reflect industry standard. Primary duties are serving at the Circulation Desk, checking books in and out, processing fines and fees and library cards.
Tzintzun	Christian	Library Assistant I	Library Technician	Reclassification	Reclassification to reflect industry standard. Primary duties are ordering materials for the Library collection; maintaining and repairing books,

					DVDS, and other materials; Managing ILL program; also serves in admin support capacity but only around 20%
Aguila	Erika	Library Administrator	Administrative Services Manager	Title Change	Title change based on industry standards; this is an administrative support role for the District Director regarding Finance and HR functions.
Morales	Fernando	Circulation Manager	Library Manager	Title Change	Title change on industry standards; this is the #2 position in the District; incumbent handles everything from IT to Circulation to facilities management.
Saucedo	Yoselin	Library Assistant I	Library Assistant	Title Change	Title Change to reflect industry standard. Eliminate "I, II, II, III" levels.



October 2020
FLSA: Exempt

DISTRICT DIRECTOR

DEFINITION

Under policy direction from the Board of Trustees, the District Director serves as the Chief Executive Officer of the Banning Library District; plans, organizes, and administers the District's operations, services, and programs; implements Board of Trustee policies; supervises and provides day-to-day leadership for District staff; prepares reports on the short-term and long-term issues facing the District; prepares the annual budget and reports on the financial stability of the District; maintains effective working relationships with the Board of Trustees, Friends of the Library, and other boards and commissions; and performs related work as required. The District Director is an exempt position that serves at the pleasure of the Board of Trustees.

SUPERVISION RECEIVED AND EXERCISED

Receives policy direction from the Board of Trustees. Exercises direct supervision over supervisory, professional, technical, and administrative support staff through subordinate levels of supervision.

CLASS CHARACTERISTICS

The District Director serves as the Chief Executive Officer of the District, is accountable to the Board of Trustees, and has overall responsibility for the development, management, and administration of the District's operations, services, and programs. The incumbent is expected to exercise independent judgment, wisdom, common sense, and initiative in establishing efficient and effective operations consistent with Board policies. The incumbent acts as the District's staff liaison to the Board, Friends of the Library, and other boards and commissions. The incumbent is responsible for implementing Board policies and is charged with representing the Board at local, regional, and state meetings related to the provisions of a special district and library services. The duties of the District Director are to direct, coordinate and review the activities of various library operations concerning personnel, financial resources, equipment, information technology, services, and programs.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so qualified employees can perform the essential functions of the job.

- Plans, organizes, and administers operations of the Library District either directly or through subordinate management and supervisory staff; coordinates and evaluates the work of the District in accordance with applicable laws, codes, regulations, and adopted policies and objectives of the Board of Trustees; ensures staff work is completed on time and accurately.
- Directs and coordinates the development and implementation of strategic plans, goals, objectives, programs, and policies for the Board of Trustees and the District, including personnel policies in accordance with State of California statutes; develops administrative policies, procedures, and work

standards to ensure strategic plans, goals, and objectives are met, and services are provided in an effective, efficient, and economical manner.

- Oversees the preparation of the District's annual budget and periodic budget adjustments for Board consideration and approval; conducts studies and makes oral and written budget presentations; authorizes directly or through staff, budget transfers, expenditures, and purchases; explores potential revenue sources; performs fundraising activities; seeks and applies for grants; provides information regarding the District's financial condition and needs to the Board of Trustees.
- Develops and standardizes policies, procedures, and methods to improve and continuously monitor the efficiency and effectiveness of District programs, projects, service delivery methods, and procedures; assesses and monitors workload, administrative and support systems, and internal reporting relationships; identifies best practices and opportunities for improvement and recommends to the Board of Trustees.
- Recruits, selects, promotes, trains, motivates, and evaluates assigned staff; oversees human resources administration functions; provides or coordinates staff training; works with employees on performance issues; implements discipline and termination procedures; directs and coordinates the work plan and workflow for assigned staff; assigns work activities, projects, and programs; reviews and approves timecards and payroll; reviews and evaluates work products, methods, and procedures; oversees personnel actions and addresses personnel issues.
- Prepares and recommends long- and short-term plans for District programs, services, and funding; directs the development of specific proposals for action regarding current and future District needs.
- Participates in Board of Trustee meetings and is responsible for the preparation of the agenda and reporting of the minutes for all meetings.
- Ensures the Board is kept informed of District functions, activities, issues, programs, and financial status, and of legal, social, and economic issues affecting District activities; prepares options for the Board of Trustees to consider for future policy actions.
- Selects and de-selects books and other library material for all areas of the Library.
- Oversees the administration, development, use, and maintenance of all District buildings, grounds, and equipment; works closely with staff on maintenance efforts to ensure safety and security of staff and the public throughout the Library.
- Plans and directs the acquisition, implementation, and use of information technology; works closely with staff on issues related to technology or facilitating upgrades to current systems.
- Represents the District and the Board in meetings with governmental agencies, other libraries, community groups, the State Special District Association, and various business, professional, educational, regulatory, and legislative organizations.
- Directs, develops, and coordinates the public relations activities of the library; conducts community outreach, networking, community relations, and advocacy efforts for the Library; plans and attends special events and other community services; makes presentations to community groups and encourages citizen participation in the affairs of the District.
- Oversees Library operations including system-wide program and event schedules; conducts meetings with management team and staff; discusses workplans, progress, and any roadblocks with staff.
- Selects vendors and enters agreements for contractual services; ensures contractors provide adequate insurance to reduce liability for the District; ensures proper performance of contractors.
- Presents reports and conducts analyses on issues facing Special Districts; assists in planning for the implementation of policies which address state legislation.

- Directs the preparation of and prepares a variety of correspondence, reports, policies, procedures, and other written materials; prepares and submits reports of library activities to the Library Board, the State Library of California, and other governmental agencies as required.
- Monitors changes in laws, regulations, technology, and trends that may affect District operations; implements policy and procedural changes as required; maintains memberships in professional associations; attends conferences, workshops, and training opportunities.
- Investigates and responds to the most complex, difficult, and sensitive public and staff inquiries and complaints regarding the administration and services provided by the District; assists with resolutions and alternative recommendations; maintains cordial relations with all persons entitled to the services of the District.
- Provides properly trained staff and a motivating a positive customer and employment work climate for the District.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting, program and policy development, implementation, and evaluation, and supervision of staff, either directly or through subordinate levels of supervision.
- Principles and practices of leadership.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Principles and practices of strategic plan development.
- Principles and practices of budget administration.
- Principles and practices of contract management.
- Human resources and personnel management practices.
- General principles of risk management.
- Principles, practices, and procedures of public administration.
- Functions, authority, and responsibilities of an elected Board of Trustees.
- Planning, administering, and appraising a public library program.
- Information technology related to the delivery of library services.
- Principles of change management.
- Theory, principles, and practices of modern library management including collection development and technical services.
- Functions, services, and funding sources of a government entity.
- Current social, political, and economic trends affecting local government and service provision.
- Recordkeeping principles and procedures.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Methods and techniques of developing technical and administrative reports and business correspondence
- Research methods and techniques.
- Federal, state, and local laws, codes, and regulations relevant to assigned areas of responsibility.
- District and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Develop and implement goals, objectives, practices, policies, procedures, and work standards.
- Provide administrative and professional leadership for the District.
- Prepare and administer large and complex budgets and long-range financial plans; allocate limited resources in a cost-effective manner.
- Interpret, apply, explain, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate the work of management, supervisory, professional, technical, and administrative support personnel; delegate authority and responsibility.
- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Effectively administer special projects with contractual agreements and ensure compliance with contractual obligations.
- Utilize information technology software that generates reports and financial information.
- Effectively manage workplace diversity issues in a diverse organization; understand, celebrate, and serve diverse groups of people.
- Assume responsibility for maintaining a safe working environment.
- Maintain a personal commitment to providing exceptional public service.
- Prepare and deliver effective presentations before community groups, Library Board of Trustees, commissions, committees, and District staff.
- Work cooperatively with, provide highly complex and responsible staff support to, and implement the policies of the Library Board of Trustees.
- Effectively represent the District in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory, and legislative organizations; build relationships with community members and stakeholders.
- Direct the preparation of clear and concise reports, correspondence, policies, procedures, and other written materials.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Direct the establishment of filing, recordkeeping, and tracking systems.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

- Equivalent to a master's degree from an accredited college or university with major coursework in library and information science or a related field.

Experience:

- Five (5) years of increasingly responsible professional library experience in a management or leadership capacity, including four (4) years of supervisory experience.

Licenses and Certifications:

- Possession of a valid California Driver's License, to be maintained throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Occasional evening and weekend work may be required as job duties demand.



October 2020
FLSA: Non-Exempt

LIBRARY MANAGER

DEFINITION

Under general direction, organizes, oversees, coordinates, and manages the staff and operations of the circulation desk, information technology, and other library services and functions; plans, schedules, assigns, reviews, and supervises the work of staff providing library services for patrons; monitors, troubleshoots, and resolves computer and other technology related issues; develops and generates a variety of statistical reports; may be designated in charge of the Library during the absence of the District Director; provides complex staff assistance to management staff in areas of expertise; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the District Director. Exercises direct supervision over professional, paraprofessional, and administrative support staff.

CLASS CHARACTERISTICS

This is a management classification responsible for planning, organizing, and managing the staff, operations, and activities of one or more assigned Library functions. Incumbents are responsible for performing diverse, specialized, and complex work involving significant accountability and decision-making responsibilities related to assigned library services and activities. Incumbents serve as a professional-level resource for organizational, managerial, and operational analyses and studies. Performance of the work requires the use of considerable independence, initiative, and discretion within broad guidelines.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so qualified employees can perform the essential functions of the job.

- Organizes, oversees, coordinates, and manages the staff and operations of the Library's circulation desk, information technology, and other library services and functions.
- Participates in the selection of, schedules, trains, motivates, supervises, and evaluates assigned personnel; coordinates the daily activities of assigned staff; assigns and checks work and ensures employees perform work properly; establishes work schedules for entire Library staff; adjusts staff schedules to ensure proper coverage at public desks.
- Monitors, troubleshoots, and resolves computer, technical, and mechanical issues for District staff and patrons including personal computers, laptops, Wi-Fi connections, printers, microfilm machines, DVD players, and other library equipment; troubleshoots and resolves online database issues; contracts with and oversees vendors to perform computer hardware repair and replacement as needed.

- Sets up computers, printers, and other peripherals for public use; sets up networks and installs network cabling; downloads software; ensures safety and security of Library data and network connections; sets up online meetings for District staff.
- Reviews and approves employee timecards and employee requests for time off; collaborates with the Administrative Services Manager on payroll issues; compares employee hours scheduled against actual hours worked to resolve any payroll discrepancies; works with employees to correct deficiencies; recommends and implements discipline and termination procedures; plans, organizes, and coordinates meetings, seminars, conferences, and training sessions for department staff; processes personnel actions and related matters.
- Assists District Director with grants administration; receives grant funding and oversees grant expenses.
- Manages the District's website; supervises social media posts; maintains and supports computer networking, high speed internet, Library databases, and digital records.
- Serves at the circulation desk as needed; checks books and materials in and out for Library patrons; processes library cards; processes fines and fees; tabulates cash register receipts; monitors patron activities throughout the Library; assists patrons with books, circulation desk functions, or other requests for service; oversees the summer reading program and staff.
- Manages, monitors, and responds to e-mails sent to the District by patrons, vendors, City Hall staff, School District staff, and others; maintains and provides technical support for staff e-mail accounts.
- Prepares a variety of staff reports and other necessary correspondence related to assigned activities and services; serves on a variety of ad-hoc staff committees as assigned by the District Director.
- Develops and generates a variety of reports summarizing Library circulation activities and statistics including the number of library cards processed, number of patrons served, summaries of library events, and other metrics as requested by the Library Board or as required by the State of California.
- Oversees cleanliness, maintenance, and safety of assigned areas; assembles and moves furniture for board meetings, special events, and other activities; performs some building maintenance functions including changing light bulbs, clearing out pipes, painting, and basic landscaping functions.
- Directs the establishment and maintenance of working and official department files.
- Ensures staff compliance with District and mandated safety rules, regulations, and protocols.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting, program development, implementation, and evaluation, and project management.
- 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 leadership.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned areas of responsibility.

- Organization and management practices as applied to the development, analysis, and evaluation of programs, policies, and operational needs of the assigned area of responsibility.
- Principles and practices of contract administration and management.
- Modern public library organization, procedures, and policies.
- Basic accounting and budgeting.
- Literature and standard works in various fields.
- Reference sources and methods to serve adults and children.
- Skills required to perform reference work for adult and children using print and electronic resources.
- System networks, Internet Protocol (IP) networks, and network configuration techniques.
- Microsoft Windows operating systems and Microsoft Office Suite software.
- Library policies, procedures, and administration including the Dewey Decimal system and alphabetical filing systems.
- Principles and practices of cataloging and integrated library catalogue systems.
- Calendaring and scheduling techniques.
- Principles and procedures of recordkeeping.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Recent and ongoing developments, current literature, and sources of information related to library and information technology operations.
- Methods and techniques of preparing technical and administrative reports, and general business correspondence.
- District and mandated safety rules, regulations, and protocols.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

Ability to:

- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Identify problems, research and analyze relevant information, and develop and present recommendations and justification for solutions.
- Process information coming from various sources simultaneously.
- Handle difficult people with diplomacy and tact; diffuse hostile or aggressive individuals.
- Exhibit exceptional customer service skills
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Respond to complaints or inquiries from patrons, staff, and outside organizations.
- Present information to Library management, public groups, and the Library Board of Trustees.
- Prepare clear, effective, and accurate reports, correspondence, and other written materials.
- Maintain accurate logs, records, and written records of work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.

- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

- Equivalent to a bachelor's degree from an accredited college or university with major coursework in library science, computer science, information technology, or a related field.

Experience:

- Five (5) years of increasingly responsible experience in information technology, library operations, library information systems, or a related field including two (2) years of supervisory experience.

Licenses and Certifications:

- Possession of a valid California Driver's License, to be maintained throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Occasional evening and weekend work may be required as job duties demand.



October 2020
FLSA: Non-Exempt

ADMINISTRATIVE SERVICES MANAGER

DEFINITION

Under general direction, performs a wide variety of paraprofessional and administrative support duties for the District's accounts payable, payroll, human resources, grants administration, purchasing, and other assigned functions, operations, and programs; tracks District expenditures and prepares a variety of budgetary reports; processes payroll for District employees; administers employee benefits programs; provides responsible administrative support to the District Director in areas of expertise; may be designated in charge of the Library in the absence of the District Director; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the District Director. Exercises technical and functional direction over and provides training to assigned paraprofessional, technical, and clerical staff.

CLASS CHARACTERISTICS

This is a management classification responsible for independently performing paraprofessional and administrative support duties for the District's financial, human resources, and payroll programs. Positions at this level exercise judgment and initiative in their assigned tasks, receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so qualified employees can perform the essential functions of the job.

- Performs accounts payable functions; processes vendor invoices and ensures timely vendor payments; maintains vendor records, files, and lists; tracks District expenditures; reconciles accounts on a routine basis; maintains a variety of financial records and files.
- Assists in the preparation of the District's annual budget; prepares and submits reports on revenues and expenditures to the District Director for budget preparation purposes; prepares monthly expenditure reports for District staff and the Board of Trustees; monitors the budget for all operations of the Library.
- Assists District Director with grants administration; receives grant funding and oversees grant expenses; provides staff assistance for third party grant and other financial auditors.
- Performs duties related to purchasing; maintains the District's purchasing system; documents materials and supplies purchased; oversees and maintains the District's fixed asset inventory.
- Administers the District's human resources functions including recruitment and selection processes for library positions; schedules interviews, prepares interview packets, and coordinates interview raters; conducts reference checks for candidates for employment; tracks employee performance evaluations; tracks and informs District Director of upcoming required training for employment.

- Oversees onboarding of new hires including collecting and processing required documents and enrolling employees in District provided benefit plans; ensures new hires meet all requirements to begin work; maintains personnel files and documents.
- Administers employee benefit programs including insurance, paid leave, open enrollments, and deferred compensation programs; processes employee benefits enrollment and change transactions in conjunction with third party benefit brokers and vendors.
- Administers District payroll; collects, reviews, and inputs employee timecards and timekeeping transactions; inputs and submits payroll data into database; verifies hours worked and accrued hours; follows up with staff on any discrepancies; coordinates with the contractors handling payroll functions; runs payroll reports; approves payroll for direct deposit; answers staff questions.
- Oversees, processes, and approves petty cash requests, reimbursements, bank deposits, cash register receipts, and other cash-related transactions.
- Assigns work, schedules training, and oversees work of assigned staff.
- Provides administrative support and special projects for the District Director, as assigned; attends Board of Trustee meetings as required; serves on a variety of ad-hoc staff committees as assigned by the District Director.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and procedures for governmental accounting, collections, processing payroll, accounts payable, grants administration, and purchasing functions.
- Principles, practices, and techniques of human resources administration including recruitment and selection, benefits program administration, and classification and compensation.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned areas including governmental budgeting, accounting, and human resources administration.
- Principles and procedures of recordkeeping, document processing, business correspondence, and filing systems.
- Modern office practices and principles.
- Financial management information systems and technology software.
- District and mandated safety rules, regulations, and protocols.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Principles of providing functional direction and training
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Perform a variety of paraprofessional finance, accounting, grants administration, and payroll duties such as reviewing, recording, and documenting a variety of financial transactions and verifying the accuracy of financial data.
- Perform a variety of paraprofessional human resources duties involving administration of employee benefits, recruitment and selection, and classification and compensation functions.
- Maintain confidentiality of sensitive personal information of current and former employees and other matters affecting District human resources administration.
- Prepare clear, complete, and concise statements and reports.
- Understand accounting, budgeting, and financial statements and reports.
- Make accurate arithmetic, financial, and statistical computations.
- Manage workflow in an orderly fashion.
- Perform difficult clerical work and make decisions based upon District policies and procedures.
- Plan, organize, and coordinate the work of assigned staff.
- Effectively provide staff leadership and work direction.
- Analyze a variety of problems and situations and recommend solutions.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, and procedural, guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

- Equivalent to completion of the twelfth (12th) grade, supplemented by college level coursework in finance, accounting, human resources, or a related field. A bachelor's degree in finance, accounting, human resources, or a related field is desired.

Experience:

- Three (3) years of increasingly responsible experience in finance administration, human resources administration, accounting, bookkeeping, or a related field.

Licenses and Certifications:

- Possession of a valid California Driver's License, to be maintained throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Occasional evening and weekend work may be required as job duties demand.