

**ATTACHMENT 1**

**FINAL REPORT  
OF THE  
CLASSIFICATION  
AND  
TOTAL COMPENSATION STUDY  
FOR THE  
SAN DIEGO HOUSING COMMISSION**

**VOLUME I**

**CLASSIFICATION – PHASE I**

**Phase I Completed June 30, 2009  
Report Developed/Submitted September 2009**

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September 28, 2009

Ms. Carrol Vaughn  
Executive Vice President & Chief Operating Officer  
San Diego Housing Commission  
1122 Broadway, Suite 300  
San Diego, CA 92101

Dear Ms. Vaughn:

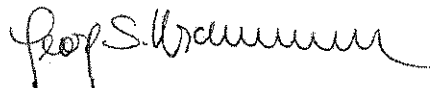
Koff & Associates is pleased to present the final classification and total compensation report for the study of all positions at the San Diego Housing Commission. Volume I documents the classification study process, which was Phase I of the classification and compensation study, and provides recommendations for the classification plan, allocations of individual positions for all Housing Commission staff, and new/updated class specifications. Volume II, to be sent under separate cover at a later date, documents the total compensation study, findings, and recommendations, including Phase II and III of the project.

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 their supervisors and managers; supervisory, management, and employee review and comments in the form of draft class descriptions; and class allocation recommendations.

We would like to thank you, Tina Holmes, Terry Whitesides, Krista VonWiller, Christine Liptak, and other Housing Commission staff 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 and of course, are available any time to provide you our professional assistance.

Very truly yours,

A handwritten signature in black ink, appearing to read "Georg S. Krammer". The signature is written in a cursive style with a long, sweeping underline.

Georg S. Krammer  
Chief Executive Officer

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CLASSIFICATION – PHASE I**

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**VOLUME I  
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**BACKGROUND**

In November of 2008, the San Diego Housing Commission contracted with Koff & Associates, Inc. to conduct a classification and total compensation study for all Housing Commission staff. This study was precipitated by several factors:

- The concern of management that employees should be recognized for the level and scope of work performed and that they be paid on a fair and competitive basis that allows the Housing Commission to recruit and retain a high-quality workforce;
- The fact that some class descriptions needed to be systematically reviewed and updated as they may have no longer reflected current responsibilities, programs, rules and regulations, and technology;
- The desire to have a classification and compensation plan that can meet the needs of this progressive and continuously changing organization;
- The desire to ensure that the Housing Commission has adequate career paths and a classification system that will foster career service within the organization; and
- The desire to ensure that appropriate internal relationship differentials are used to provide an equitable and sound compensation plan across Housing Commission departments.

A total of approximately two hundred thirty (230) authorized positions (i.e., employees) were studied allocated to about eighty-three (83) classifications (partly newly created during the classification study process.

**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 and interviews with employees, supervisors, and management;
- Prepare an updated classification plan, including updated class descriptions, position allocations, and career ladders for individual job categories, that:
  - Recognizes the scope and level of the various classes and positions;
  - Improves the framework for evaluating employee performance during introductory and continuing periods of employment;
  - Allows for organizational change to increase customer service levels and cost effectiveness;
  - Provides an improved basis for recruiting, assessing, and selecting employees; and
  - Provides a basis for establishing a compensation plan that is related to the nature of the work performed.
- Provide up-to-date class descriptions and supporting documentation for compliance with the Americans with Disabilities Act (ADA), the Fair Labor Standards Act (FLSA), and classification standards, including knowledge, skills, abilities, and other requirements that are job-related and meet other legal guidelines; and
- Provide sufficient documentation to allow the Housing Commission 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 Housing Commission Management and Human Resources to clarify study scope, objectives, processes, and deliverables.
- Orientation meetings were held to which all employees were invited, to meet consultant staff involved with the project, clarify study objectives and procedures, answer questions, and distribute the Position Description Questionnaires.
- After the Position Description Questionnaires were completed and reviewed by directors, managers, supervisors, and consultant staff, interviews were conducted with at least a representative sample of employees in each classification.
- Following the analysis of the classification information gathered, draft class concepts, specifications, and position allocations were developed for management, supervisory, and employee review.

- As organizational changes have occurred during the study, such changes were included in all draft materials, up to June 2009. Some organizational changes that occurred after June 2009 have also been included in this report but were not specifically studied by Koff & Associates. Some of those changes are shown below in this report.
- After resolution of issues, wherever possible, including additional contacts Housing Commission Management, Human Resources, and staff to gain more details and clarification, appropriate modifications were made to the draft specifications and allocations and this final report was prepared.

## **CLASSIFICATION CONCEPTS**

### **The Difference between Positions and 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 several positions are assigned to one class, it means that the same title is appropriate for each position; that the scope, level, duties, and responsibilities of each position assigned to the class are sufficiently similar (but not identical), that the same core knowledge, skills, abilities, and other requirements are appropriate for all positions, and that the same salary range is equitable for all positions in the class.

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 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, level of responsibility, essential job functions, and requirements of the class, not detail-specific position responsibilities.

Positions are 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), the impact of the position on the organization, and working conditions. Positions are not classified or allocated to a class based on the performance of the individual employee, their capabilities, or the amount of work they perform.

## **The Relationship of Classification and Compensation**

Classification, 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 within 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 typically influenced by two factors:

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

Compensation findings and recommendations for the Housing Commission are covered in Volume II of this 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;
- Objective appraisal of employee performance;
- Development of training plans and professional development;
- Design of an equitable 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.

## **Class 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 will be submitted to the Housing Commission's Human Resources Department under separate cover, due to the large volume.

As mentioned earlier, the class descriptions are based upon the information from the written Position Description Questionnaires completed by each employee, the individual job audit interviews, and from information provided by employees, supervisors, and managers during the multiple 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.

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 an agency. 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 Human Resources to ensure consistency within the Housing Commission 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.

**Distinguishing 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 Essential Functions:** This section provides a list of the major and essential duties, intended to define the scope and level of the class and to support the Qualifications, including Knowledge and Abilities. 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 section provides a listing of the job-related knowledge and abilities 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.

**Education and Experience:** A listing of educational and experience requirements that outline minimum and alternative ways of gaining the knowledge, skills, and abilities required for entrance into the selection process. These elements are used as the basic screening technique for job applicants.

**Licenses and Certifications:** Licenses and/or certifications identify those specifically required in order to perform the work. Note that an appropriate driver's license is not automatically included in the description because such license should only be required if it is essential to the successful performance of the work.

**Physical Demands:** This section identifies the basic physical skills required for performance of the work. These are not presented in great detail (although they are more specifically covered for documentation purposes in the Position Description Questionnaires) 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 Elements:** 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.

**CLASSIFICATION FINDINGS AND RECOMMENDATIONS**

All class descriptions were updated or newly created in order to ensure that the format is consistent, and that the duties and responsibilities are current and properly reflect the required knowledge, skills, and abilities.

**Title Change Recommendations**

One change in the classification plan, as noted above, was the title change of certain classes to more accurately reflect the actual job responsibilities and duties performed by incumbents in the class as well as to reflect current industry terminology.

There are approximately eighty-two (82) positions (i.e., employees) in the following twenty-four (24) classifications recommended for title changes, which represents about 35% of the Housing Commission’s workforce:

<b>Current Class Title</b>	<b>Proposed Class Title</b>
Assistant Director, RAP	Quality Assurance Manager
Assistant Director of Housing Programs	Housing Programs Manager
Assistant Director of Housing Programs	Workforce & Economic Development Manager
Budget Officer	Budget Manager
Communications Officer	Communications Manager
Fiscal Services Specialist	Payroll Specialist
Housing Aide II	Housing Aide
Housing Assistant II	Compliance Monitoring Assistant
Housing Assistant II	Housing Assistant
Housing Construction Officer	Housing Construction Manager
Housing Specialist	Compliance Monitoring Specialist
Human Resources Officer	Human Resources Manager
Information Technology Officer	Information Technology Manager
Loan Management Supervisor	Loan Services Manager
Loan Production Specialist	Loan Underwriting Specialist
Maintenance Technician II	Maintenance Technician
Office Assistant II	Office Assistant
Program Integrity Unit Hearing Coordinator	Program Integrity Coordinator
Program Analyst – Finance	Management Analyst
Program Analyst – Business Services	Procurement/Contract Analyst
Project Manager	Program Manager - Business Services
Secretary to the President	Executive Assistant to the President & CEO
Senior Storekeeper	Purchasing Technician
Supervising Project Manager	Housing Development Manager

\*Please note that not all positions within each of these classes were recommended for a title change, only where appropriate.

One example to address classifications that did not “fit” well within the structure (i.e., did not reflect industry best practices or common HR standards), were the current “S42” classifications. In an effort to streamline some of the Housing Commission’s titles, we identified this mid-management level within the organization (i.e., the “S42” classifications) and recommend a general movement to “manager” titles from previously classified “officers” and “assistant directors.”

Any compensation recommendations (detailed in Volume II of this report) 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 included in Appendix I of this report.

**Reclassification Recommendations**

We found that several positions worked out of class due to level and scope of work and/or job functions that have been added or removed from those positions over time.

There are approximately eighteen (18) positions (i.e., employees) in the following eleven (11) classifications recommended for title changes, which represents about 8% of the Housing Commission’s workforce:

Current Class Title	Proposed Class Title
Accounting Supervisor	Financial Services Supervisor
Financial Specialist **	Project Manager
Housing Supervisor	Senior Housing Supervisor
Information Technology Assistant	Senior Information Technology Assistant
Maintenance Supervisor	Housing Construction Supervisor
Program Analyst	Senior Program Analyst
Senior Housing Assistant	Housing Assistant
Senior Information Technology Analyst	Principal Information Technology Analyst
Senior Program Analyst	Principal Program Analyst
Senior Program Analyst	Program Manager - Board & Executive
Senior Maintenance Technician	Maintenance Technician
Storekeeper	Purchasing Technician

\*Please note, not all incumbents within each of these classes were reclassified, only where appropriate.

\*\*The only position within this class was studied and our recommendation was based on that analysis; however, due to internal organizational changes, this classification no longer exists.

### Internal Classification Changes

Typically, classification studies take several weeks or months to complete, depending on the size of the organization and the number of employees involved. It has been our experience that every organization usually experiences some changes while a classification study is in progress. This is certainly the case with the Housing Commission, a very progressive organization that continues changing and reinventing itself to better serve the community of the City of San Diego.

The organizational changes that have occurred since the beginning of the classification study and up until June 2009, have been included in our documentation and this report.

The following ten (10) positions/classifications (or approximately 4% of the Commission’s workforce) were affected by internal organizational changes:

<b>Original Class Title</b>	<b>New Class Title</b>	<b>Action</b>
Community Relations Specialist	Communications Writer/Website Coordinator *	Reassignment
Director of Business Services	Vice President of Business Services	Title Change
Director of Development & Asset Management	Vice President of Asset Management	Title Change and Reassignment
Director of Financial Services	Vice President of Financial Services	Title Change
Director of RAP	Vice President of RAP	Title Change
Director, Housing Finance	Vice President of Special Housing Initiatives	Title Change and Reassignment
Senior VP, Housing Development & Finance	Senior Vice President, Real Estate	New Classification
Supervising Project Manager	Director of Real Estate *	Title Change and Reassignment
N/A	Vice President, Community Relations & Communications	New Classification
N/A	Assistant Vice President of Real Estate	New Classification

\*This internal change occurred after June 2009.

The organizational changes that have been implemented at the Housing Commission while the classification study was in progress resulted in several title changes and reassignments for certain positions/classifications, as indicated in the table above.

## **Other Recommendations**

Throughout the course of this study, the Housing Commission has made other organizational changes, independent of the recommendations above. These changes included promotions, changes in departmental organization, new classifications, and lateral movements. All recommended as well as internal changes, as of June 2009, can be found in Appendix I.

## **No Changes of Classifications**

Overall, approximately one hundred thirty-three (133) positions (i.e., employees) in thirty-eight (38) of the Housing Commission classifications are not being recommended for any classification changes. This represents about 55% of SHDC's workforce. However, all class descriptions were reviewed and updated to ensure that they are appropriate and accurately reflect any changes in essential job functions and qualification requirements.

## **Class Series**

Throughout the course of this study, and especially during the PDQ interview and organizational review stages, as mentioned earlier, it was apparent that many of the Housing Commission's previously established class series (e.g., Housing Aide I/II, Maintenance Technician I/II/Senior, Office Assistant I/II/Senior, etc.) were not being utilized, especially at the entry/trainee levels. We therefore recommend collapsing several class series and eliminating the entry/trainee level.

On the other hand, some class series were expanded to include additional levels for training and promotional purposes. After a thorough review and analysis of the Housing Commission's class series, corresponding incumbent duties, and collaboration with management, we revamped the classification structure in order to make it more customized and manageable for the Housing Commission. The following changes are recommended:

- The Housing Aide I/II flexibly-staffed series was collapsed into one classification of Housing Aide.
- The Maintenance Technician I/II/Senior series was collapsed into one journey-level classification of Maintenance Technician.
- The Office Assistant I/II/Senior series was collapsed into two classes of Office Assistant and Senior Office Assistant.
- The Storekeeper/Senior Storekeeper series was collapsed and renamed into one classification of Purchasing Technician.
- The Housing Assistant I/II/Senior class series was collapsed into two classes of Housing Assistant and Senior Housing Assistant. In addition, a distinctive assignment within the Housing Assistant classification was separated into the more specialized classification of Compliance Monitoring Assistant.
- The Program Analyst/Senior Program Analyst series was expanded to include an additional supervisory-level, Principal Program Analyst.

- The Information Technology Analyst/Senior Information Technology Analyst series was expanded to include an additional supervisory-level, Principal Information Technology Analyst.
- The Information Technology Assistant class was expanded to include an additional lead-level Senior Information Technology Assistant.
- The Housing Supervisor class was expanded to include a Senior Housing Supervisor, in recognition of an additional level of greater responsibility and complexity.

It is important to note that a classification study is usually a “snapshot in time”, identifying the organization of work and the required qualifications to perform this work through questionnaires and interviews in a finite period of time. By collapsing and/or expanding class series, the classification structure has a balance that allows the Housing Commission to attract and retain the most highly qualified workforce, apart from compensation and monetary rewards, as well as more easily manage the classification system.

### **FLSA Status**

One of the major components of the job analysis and classification review was 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.

The main issue that surfaced during this review were the discrepancies between the recommended FLSA and the current FLSA statuses of some classifications. As we reviewed position description questionnaires and draft classification specifications, it became evident that FLSA status was not always properly defined throughout the organization based on our analysis of each classification’s essential job functions.

There are three levels for the determination of the appropriate FLSA status that were utilized and on which we based 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 \$455 per week (\$23,660 per year), not subject to reduction due to variations in quantity/quality of work performed. Note: computer professionals’ salary minimum is defined in hourly terms as \$27.63 per hour.

*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 particular 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.
- Review and analysis of workflow, organizational relationships, policies, and other available organizational data.

The following highlights some of the FLSA analyses and recommendations:

- Our recommendation for all Specialist classes is that they should be FLSA non-exempt. The main reason is that these classifications work within detailed and well-defined sets of rules and regulations, policies, procedures, and practices that must be followed when making decisions. While the knowledge base required to perform the work may be significant, the framework within which incumbents work is fairly restrictive and finite. Finally, the FLSA does not allow for the consideration of workload and scheduling when it comes to exemption status.
- Although it is more common for all positions within a classification to be under the same FLSA status, potentially there could be both exempt and non-exempt positions within a classification. For example, the Management Analyst assigned to risk management within the Financial Services Department does not qualify for exemption from overtime, while other Management Analysts may. In reviewing the incumbent's PDQ, we found that the time spent on exempt duties was less than 50%, which makes this particular position non-exempt.



- The FLSA status of one classification, the On-Site Property Manager, was reviewed by a separate study conducted by legal counsel and Human Resources and met the criteria for the exempt designation. Koff & Associates did not analyze this classification for FLSA purposes.

Original Class Title	Original FLSA Status	New Class Title	New FLSA Status
Housing Specialist	Exempt	Housing Specialist	Non-exempt
Housing Specialist	Exempt	Compliance Monitoring Specialist	Non-exempt
Inspection Coordinator	Exempt	Inspection Coordinator	Non-exempt
Loan Servicing Specialist	Exempt	Loan Servicing Specialist	Non-exempt
Loan Production Specialist	Exempt	Loan Underwriting Specialist	Non-exempt
Program Analyst	Exempt	Management Analyst	Non-exempt
Program Integrity Unit Hearing Coordinator	Exempt	Program Integrity Coordinator	Non-exempt
Community Relations Specialist *	Exempt	Senior Administrative Assistant *	Non-exempt

\* This recommendation is obsolete because of internal organizational changes that reclassified this class to Communications Writer/Website Coordinator.

Please refer to Appendix II for a list of classification-specific FLSA status changes proposed.

It is important for the Housing Commission to review Koff & Associates’ recommendations and continuously monitor that the proposed FLSA statuses remain valid and appropriate based on changing assignments.

### **MAINTAINING THE CLASSIFICATION PLAN – CLASSIFICATION CONCEPTS**

A classification plan is not a stable, unchanging entity. Positions may grow and change depending upon technology, service delivery requirements, and a number of other factors. The classification concepts included in this report will assist the Housing Commission in the future in allocating new and/or realigned positions within the newly recommended classification structure. By utilizing this process, the Housing Commission will be able to change and grow the organization while maintaining the structure that has been created within this study.

As requests for new positions or reclassifications occur, each of the following factors should be reviewed.

#### **1. Type and Level of Knowledge, Skill, and Abilities Required**

This factor defines the level of job knowledge, skill, and abilities, 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 basic or entry-level into any occupational field**

This entry-level knowledge may be attained by obtaining a high school diploma, completing specific technical coursework or obtaining a four-year or advanced college or university degree. Entry-level positions generally perform more routine and repetitive duties under direct/immediate supervision, and if within a class series, the incumbents do not perform the full range of work assigned to the next higher, journey-level, classification. This level is often used as a trainee level and incumbents may not need to have any or only very limited experience upon entry into this level.

**B. The experienced or journey-level in any occupational field**

This knowledge, skill, and abilities level recognizes 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.

**C. The advanced or senior level in any occupational field**

This knowledge, skill, and abilities 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, skill, and abilities are considered in a separate factor and should not influence any assessment of this factor. This level could also be attained by having knowledge, skill, and abilities in a highly specialized area/function of the occupational field, requiring additional specialized training and/or certifications.

**2. Supervisory/Management Responsibility**

This factor defines the supervisory and managerial responsibility, including short- and long-term planning, budget development and administration, resource allocation, policy and procedure development, and direction of staff.

**A. No ongoing direction of programs or 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 and assistance with employee performance evaluations are normally involved.

**C. Coordinator**

The term “Coordinator” is often used for classes responsible for the coordination and administration of one or more programs or projects.

The employee would typically have responsibility for independently coordinating one or more programs or projects on a regular basis. The duties involved would include the

implementation of the program's or project's goals and objectives, oversight of performance, input as to budget preparation and administration, promotion or marketing, and evaluation. Incumbents at this level may have limited supervisory responsibility such as exercising functional and technical supervision over full-time staff, or directing part-time, temporary, and/or contract staff, volunteers, and/or interns.

**D. Full first-line supervisor**

The focus of the job is on the direct supervision and coordination of a significant work unit within a division or department and also includes hands-on work activities. The employee plans, assigns, directs, and reviews the work of staff. In addition, incumbents assigned to this level make effective recommendations and/or carry out selection, performance evaluation, and disciplinary procedures.

The supervisor also exercises discretion in selecting appropriate resources to use in accomplishing assigned work; monitors and reviews work in progress, and provides technical assistance and guidance; ensures that appropriate policies and procedures are followed by subordinates; monitors, coordinates, and assists in developing the budget for the assigned area; and recommends procedures consistent with departmental directives, policies, and regulations, which are developed by higher-level management staff.

Typically, a first-line, "full" supervisory employee is responsible for directing a staff of at least two full-time employees but typically has a larger staff, and may have lead-level employees who report to him/her.

**E. First full managerial level**

The employee is considered mid-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 at the division level. Normally, this level would be titled a division manager/head.

The main difference between the first-line supervisor/coordinator and the full managerial level is that the latter has full management responsibility over a recognized division of the organization or major function within a department, while the former oversees an assigned work unit within the division and often reports to the full managerial level.

The supervisor and coordinator spend a major part of their time performing hands-on duties and activities within their functional areas, while managers spend the majority of their time on administrative, long- and short-term planning, and budgeting responsibilities. The managerial level develops, recommends, and sets the programs and policies of the division, while the supervisory level is more involved in the day-to-day implementation and execution of those programs and policies.

**F. Assistant department managerial level**

Depending on the size of an organization and/or department, a "second-in-command" level may be found. The duties and responsibilities of an assistant department head

overlap with that of the department head in various areas but are more focused on the day-to-day operations of the department. Often times, the divisions within a department report into the assistant department head who is the liaison between divisions and the department head. The assistant department managerial level is also defined by the assumption of almost all (if not all) duties and responsibilities of the department head in the department head's absence.

**G. Department managerial level**

The employee is the director or vice president of a specified department, normally reporting to the Chief Operating or Chief Executive Officer or to the governing body (i.e. Commission). This level is distinguished from the next lower level in that it has overall responsibility for all programs, projects, functions, and activities of the department, and for developing, implementing, and interpreting public policy.

**H. “Assistant” Chief Executive Officer level**

The employee's responsibilities are essentially the same as those of the assistant department managerial level, except they are translated into a “second-in-command” role for the entire organization, not just one department. The second-in-command employee assumes total administrative responsibility for the organization in the absence of the chief executive officer.

**I. Chief Executive Officer level**

The employee has total administrative responsibility for the organization.

**3. 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**

Work situations normally involve making choices among a limited number of alternatives that are clearly defined by policies and procedures. Supervision, either on-site or through a radio or telephone, is readily available.

**B. Independent, guided problem solving**

Work situations require making decisions among a variety of alternatives; however, policies, procedures, standards, and regulations guide the majority of the work. Supervision is generally available in unusual situations.

**C. Application of discriminating choices**

Work situations require searching for solutions and independently making choices among a wide variety of policies, procedures, laws, regulations, and standards. Interpretation and evaluation of the situation and available guidelines are required.

**D. Creative, evaluative or analytical thinking**

Work situations require the analysis and application of organizational policies and goals, complex laws, and/or general business or ethical considerations.

**4. 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. 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 department or function 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 department or agency-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 organization are with this employee.

**5. 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, outside agencies, and various public and private groups.

**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 agency.

**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 agency.

**D. Negotiation with organizations from a position of authority**

The employee often deals with public officials, members of boards, councils, commissions, and others to provide policy direction, explain agency missions, and/or negotiate solutions to difficult problems.

**6. 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). 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, 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; the work may require extraordinary physical demands; and/or employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

Again, we want to thank the San Diego Housing Commission for its time and cooperation in bringing this study to a successful conclusion. It has been a pleasure working with the Housing Commission on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

# **VOLUME I**

## **Appendix I**

### **Recommended Employee Allocations**

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**San Diego Housing Commission**  
**Position Allocation List**  
**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Administrative Assistant	Administrative Assistant	No change	Workforce & Econ Dev
Housing Aide II	Housing Aide	Title Change	Asset Management
Housing Construction Officer	Housing Construction Manager	Title Change	Development & Asst Mgmt
Housing Construction Specialist	Housing Construction Specialist	No Change	Development & Asst Mgmt
Housing Construction Specialist	Housing Construction Specialist	No Change	Development & Asst Mgmt
Maintenance Supervisor	Housing Construction Supervisor	Reclass	Asset Management
Assistant Director of Housing Programs	Housing Programs Manager	Title Change	Development & Asst Mgmt
Housing Supervisor	Housing Supervisor	No Change	Development & Asst Mgmt
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Senior Maintenance Technician	Maintenance Technician	Reclass	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Maintenance Technician II	Maintenance Technician	Title Change	Asset Management
Office Assistant II	Office Assistant	Title Change	Asset Mgmt
Office Assistant II	Office Assistant	Title Change	Workforce & Econ Dev
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management



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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
On-Site Property Manager	On-Site Property Manager	No Change	Asset Management
Senior Program Analyst	Principal Program Analyst	Reclass	Workforce & Econ Dev
Program Analyst	Program Analyst	No change	Workforce & Econ Dev
Resident Initiatives Coordinator	Resident Initiatives Coordinator	No Change	Workforce & Econ Dev
Resident Initiatives Coordinator	Resident Initiatives Coordinator	No Change	Workforce & Econ Dev
Resident Initiatives Coordinator	Resident Initiatives Coordinator	No Change	Workforce & Econ Dev
Resident Initiatives Coordinator	Resident Initiatives Coordinator	No Change	Workforce & Econ Dev
Senior Administrative Assistant	Senior Administrative Assistant	No change	Asset Mgmnt
Senior Administrative Assistant	Senior Administrative Assistant	No change	Asset Mgmnt
Senior Office Assistant	Senior Office Assistant	No change	Asset Mgmnt
Senior Program Analyst	Senior Program Analyst	No change	Asset Mgmnt
Senior Program Analyst	Senior Program Analyst	No change	Asset Mgmnt
Senior Program Analyst	Senior Program Analyst	No change	Workforce & Econ Dev
Senior Program Analyst	Senior Program Analyst	No change	Asset Mgmnt
Senior Resident Initiative Coordinator	Senior Resident Initiative Coordinator	No Change	Asset Management
Senior Resident Initiative Coordinator	Senior Resident Initiative Coordinator	No Change	Asset Management
Senior Resident Initiative Coordinator	Senior Resident Initiative Coordinator	No Change	Workforce & Econ Dev
Supervising Resident Initiative Coordinator	Supervising Resident Initiative Coordinator	No Change	Workforce & Econ Dev
Supervising Resident Initiative Coordinator	Supervising Resident Initiative Coordinator	No Change	Workforce & Econ Dev
Director of Development & Asset Management	VP of Asset Management	Internal Change	Development & Asst Mgmt
Assistant Director of Housing Programs	Workforce & Economic Development Manager	Title Change	Workforce & Econ Dev

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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Communications Officer	Communications Manager	Title Change	Community Relations
Community Liaison	Community Liaison	No Change	Community Relations
Comm Relations Specialist	Community Outreach Specialist	Internal Reassign.	Community Relations
Docket Coordinator	Docket Coordinator	No Change	Board & Executive
Secretary to the President	Executive Assistant to the President & CEO	Title Change	Board & Executive
Executive VP & COO	Executive VP & COO	No Change	Board & Executive
Senior Program Analyst	Program Manager - Board & Executive	Reclass	Board & Executive
Senior Administrative Assistant	Senior Administrative Assistant	No change	Board & Executive
Program Analyst	Senior Program Analyst	Reclass	Board & Executive
VP, Community Relations & Communications	VP, Community Relations & Communications	New Class	Community Relations

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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Human Resources Analyst	Human Resources Analyst	No Change	Business Services
Human Resources Officer	Human Resources Manager	Title Change	Business Services
Information Technology Analyst	Information Technology Analyst	No Change	Information Technology
Information Technology Analyst	Information Technology Analyst	No Change	Information Technology
Information Technology Assistant	Information Technology Assistant	No Change	Information Technology
Information Technology Assistant	Information Technology Assistant	No Change	Information Technology
Information Technology Assistant	Information Technology Assistant	No Change	Business Services
Information Technology Assistant	Information Technology Assistant	No Change	Business Services
Information Technology Officer	Information Technology Manager	Title Change	Information Technology
Information Technology Technician	Information Technology Technician	No Change	Information Technology
Senior Information Technology Analyst	Principal Information Technology Analyst	Reclass	Information Technology
Program Analyst	Procurement/Contract Analyst	Title Change	Business Services
Project Manager	Program Manager - Business Services	Title Change	Business Services
Senior Storekeeper	Purchasing Technician	Title Change	Bus Services-Purchasing
Storekeeper	Purchasing Technician	Reclass	Bus Services-Purchasing
Senior Storekeeper	Purchasing Technician	Title Change	Bus Services-Purchasing
Senior Administrative Assistant	Senior Administrative Assistant	No change	Business Services
Senior Administrative Assistant	Senior Administrative Assistant	No change	Business Services
Senior Human Resources Analyst	Senior Human Resources Analyst	No change	Business Services
Senior Information Technology Analyst	Senior Information Technology Analyst	No Change	Information Technology
Information Technology Assistant	Senior Information Technology Assistant	Reclass	Information Technology
Director of Business Services	VP of Business Services	Internal Change	Business Services

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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Accountant	Accountant	No Change	Financial Services
Accountant	Accountant	No Change	Financial Services
Accounting Assistant	Accounting Assistant	No Change	Financial Services
Accounting Supervisor	Accounting Supervisor	No Change	Financial Services
Accounting Supervisor	Accounting Supervisor	No Change	Financial Services
Accounting Supervisor	Accounting Supervisor	No Change	Financial Services
Accounting Technician	Accounting Technician	No Change	Financial Services
Accounting Technician	Accounting Technician	No Change	Financial Services
Accounting Technician	Accounting Technician	No Change	Financial Services
Accounting Technician	Accounting Technician	No Change	Financial Services
Budget Analyst	Budget Analyst	No Change	Financial Services
Budget Officer	Budget Manager	Title Change	Financial Services
Accounting Supervisor	Financial Services Supervisor	Reclass	Financial Services
Program Analyst	Management Analyst	Title Change	Financial Services
Fiscal Services Specialist	Payroll Specialist	Title Change	Financial Services
Senior Accountant	Senior Accountant	No Change	Financial Services
Senior Accounting Technician	Senior Accounting Technician	No Change	Financial Services
Senior Accounting Technician	Senior Accounting Technician	No Change	Financial Services
Senior Budget Analyst	Senior Budget Analyst	No Change	Financial Services
Director of Financial Services	VP of Financial Services	Internal Change	Financial Services

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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Administrative Assistant	Administrative Assistant	No change	Real Estate
Administrative Assistant	Administrative Assistant	No change	Real Estate
Supervising Project Manager	Assistant Vice President, Real Estate	Internal Reassign.	Real Estate
Housing Assistant II	Compliance Monitoring Assistant	Title Change	Real Estate
Housing Specialist	Compliance Monitoring Specialist	Title Change	Real Estate
Housing Specialist	Compliance Monitoring Specialist	Title Change	Real Estate
Supervising Project Manager	Director of Real Estate	Internal Reassign.	Real Estate
Financial Analyst	Financial Analyst	No Change	Real Estate
Housing Construction Officer	Housing Construction Manager	Title Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Specialist	Housing Construction Specialist	No Change	Real Estate
Housing Construction Supv	Housing Construction Supervisor	No Change	Real Estate
Housing Construction Supervisor	Housing Construction Supervisor	No Change	Real Estate
Loan Management Supervisor	Loan Services Manager	Title Change	Real Estate
Loan Servicing Specialist	Loan Servicing Specialist	No Change	Real Estate
Loan Servicing Specialist	Loan Servicing Specialist	No Change	Real Estate
Loan Servicing Specialist	Loan Servicing Specialist	No Change	Real Estate
Loan Production Specialist	Loan Underwriting Specialist	Title Change	Real Estate
Loan Production Specialist	Loan Underwriting Specialist	Title Change	Real Estate
Senior Program Analyst	Principal Program Analyst	Reclass	Real Estate
Program Analyst	Program Analyst	No change	Real Estate
Project Manager	Project Manager	No Change	Real Estate
Financial Specialist *	Project Manager	Reclass	Real Estate
Project Manager	Project Manager	No Change	Real Estate
Project Manager	Project Manager	No Change	Real Estate
Senior Administrative Assistant	Senior Administrative Assistant	No Change	Real Estate
Senior Administrative Assistant	Senior Administrative Assistant	No change	Real Estate
Senior Administrative Assistant	Senior Administrative Assistant	No change	Real Estate

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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Senior Administrative Assistant	Senior Administrative Assistant	No change	Real Estate
Senior Office Assistant	Senior Office Assistant	No change	Real Estate
Senior Office Assistant	Senior Office Assistant	No change	Real Estate
Program Analyst	Senior Program Analyst	Reclass	Real Estate
Senior Program Analyst	Senior Program Analyst	No change	Real Estate
Senior Program Analyst	Senior Program Analyst	No change	Real Estate
Senior Program Analyst	Senior Program Analyst	No change	Real Estate
Senior VP, Housing Development & Finance	Senior VP, Real Estate	New Class	Real Estate
Director, Housing Finance	Vice President of Special Housing Initiatives	Internal Reassign.	Real Estate

\* This classification was studied during the classification phase of the study but currently no longer exists.





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**Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Assistant II	Housing Assistant	Title Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Inspector	Housing Inspector	No Change	RAP
Housing Specialist	Housing Specialist	No Change	RAP
Housing Specialist	Housing Specialist	No Change	RAP
Housing Specialist	Housing Specialist	No Change	RAP
Housing Specialist	Housing Specialist	No Change	RAP
Housing Supervisor	Housing Supervisor	No Change	RAP
Housing Supervisor	Housing Supervisor	No Change	RAP
Housing Supervisor	Housing Supervisor	No Change	RAP
Housing Supervisor	Housing Supervisor	No Change	RAP
Inspection Coordinator	Inspection Coordinator	No Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Office Assistant II	Office Assistant	Title Change	RAP
Program Analyst	Program Analyst	No change	RAP
Prog Integrity Unit Hearing Coordinator	Program Integrity Coordinator	Title Change	RAP
Assistant Director, RAP	Quality Assurance Manager	Title Change	RAP
Senior Administrative Assistant	Senior Administrative Assistant	No change	RAP



**Volume I - Appendix I  
San Diego Housing Commission  
Position Allocation List  
Based On Data Gathered by June 2009**

<b>Current Title</b>	<b>Proposed Title</b>	<b>Action</b>	<b>Department</b>
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Senior Housing Assistant	Senior Housing Assistant	No Change	RAP
Housing Supervisor	Senior Housing Supervisor	Reclass	RAP
Housing Supervisor	Senior Housing Supervisor	Reclass	RAP
Senior Office Assistant	Senior Office Assistant	No change	RAP
Senior Office Assistant	Senior Office Assistant	No change	RAP
Senior Office Assistant	Senior Office Assistant	No Change	RAP
Senior Office Assistant	Senior Office Assistant	No change	RAP
Program Analyst	Senior Program Analyst	Reclass	RAP
Senior Program Analyst	Senior Program Analyst	No change	RAP
Director of RAP	VP of RAP	Internal Change	RAP

# **VOLUME I**

## **Appendix II**

### **Proposed FLSA Changes**

**Volume I - Appendix II  
San Diego Housing Commission  
Proposed FLSA Changes  
Based on Data Gathered by June 2009**

<b>Current Title</b>	<b>Current FLSA Status</b>	<b>Proposed Title</b>	<b>Proposed FLSA Status</b>
Housing Specialist	Exempt	Compliance Monitoring Specialist	Non-Exempt
Housing Specialist	Exempt	Compliance Monitoring Specialist	Non-Exempt
Housing Specialist	Exempt	Housing Specialist	Non-Exempt
Housing Specialist	Exempt	Housing Specialist	Non-Exempt
Housing Specialist	Exempt	Housing Specialist	Non-Exempt
Housing Specialist	Exempt	Housing Specialist	Non-Exempt
Inspection Coordinator	Exempt	Inspection Coordinator	Non-Exempt
Loan Servicing Specialist	Exempt	Loan Servicing Specialist	Non-Exempt
Loan Servicing Specialist	Exempt	Loan Servicing Specialist	Non-Exempt
Loan Servicing Specialist	Exempt	Loan Servicing Specialist	Non-Exempt
Loan Production Specialist	Exempt	Loan Underwriting Specialist	Non-Exempt
Loan Production Specialist	Exempt	Loan Underwriting Specialist	Non-Exempt
Program Analyst	Exempt	Management Analyst	Non-Exempt
Prog Integrity Unit Hearing Coord	Exempt	Program Integrity Coordinator	Non-Exempt
Comm Relations Specialist *	Exempt	Senior Administrative Assistant *	Non-Exempt

\* This recommendation is obsolete because of internal organizational changes that reclassified this class to Communications Writer/Website Coordinator

**ATTACHMENT 2**

**FINAL REPORT  
CLASSIFICATION  
AND  
TOTAL COMPENSATION STUDY  
FOR THE  
SAN DIEGO HOUSING COMMISSION**

**VOLUME II**

**TOTAL COMPENSATION – PHASE II & III**

**September 2009**

**KOFF & ASSOCIATES, INC.  
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Emeryville, CA 94608**

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510-652-5633 – fax**

**FINAL REPORT  
CLASSIFICATION AND TOTAL COMPENSATION STUDY  
FOR THE  
SAN DIEGO HOUSING COMMISSION**

**VOLUME II  
TOTAL COMPENSATION – PHASE II & III**

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**FINAL REPORT  
CLASSIFICATION AND TOTAL COMPENSATION STUDY  
FOR THE  
SAN DIEGO HOUSING COMMISSION**

**VOLUME II  
TOTAL COMPENSATION – PHASE II & III**

**BACKGROUND**

As noted in Volume I, in November of 2008, the San Diego Housing Commission contracted with Koff & Associates, Inc. to conduct a comprehensive classification and total compensation study for Housing Commission staff. All classification findings, results of the organizational review, and options for action are found in Volume I and total compensation findings and options for implementation are contained in this Volume.

This compensation review process was precipitated by:

- The concern of management that employees should be recognized for the level and scope of work performed and that they are paid on a fair and competitive basis that allows the Housing Commission to recruit and retain a high-quality staff;
- The desire to have a classification and compensation plan that can meet the needs of this progressive and continuously changing organization;
- The fact that attracting and retaining quality applicants/employees has been a challenge for the Housing Commission, especially in certain disciplines, and the desire to identify and mitigate possible reasons for it;
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across all the Housing Commission departments; and
- The fact that the Housing Commission has not conducted an organization-wide classification and compensation study in more than ten years and does not have current data regarding how it compares to the labor market and how it may want to position itself compared to its labor market.

## STUDY PROCESS

### **Benchmarking Classifications**

The study included about eighty-three (83) classifications (partly newly created during the classification study) and of the 83 classifications, we selected forty-five (45) classifications to externally review (with the intent of internally aligning the balance of classifications using internal equity principals). They are:

Accountant	Information Technology Manager
Accounting Supervisor	Information Technology Technician
Accounting Technician	Inspection Coordinator
Administrative Assistant	Loan Services Manager
Budget Analyst	Loan Servicing Specialist
Budget Manager	Loan Underwriting Specialist
Client Services Receptionist	Maintenance Technician
Communications Manager	Management Analyst
Community Liaison	Office Assistant
Docket Coordinator	On-site Property Manager
Executive Assistant to the President & CEO	Program Analyst
Financial Analyst	Program Integrity Coordinator
Housing Assistant	Project Manager
Housing Construction Manager	Purchasing Technician
Housing Construction Specialist	Resident Initiatives Coordinator
Housing Development Manager	Senior VP of Housing Dev. & Finance
Housing Inspector	Vice President of Asset Management
Housing Programs Manager	Vice President of Business Services
Housing Specialist	Vice President of Community Relations
Housing Supervisor	Vice President of Financial Services
Human Resources Analyst	Vice President of Rental Assistance Programs
Human Resources Manager	Workforce & Economic Development Manager
Information Technology Analyst	

When we contact the comparator agencies to identify possible matches for each of the benchmarked classifications, there is an assumption that we will not be able to find comparators that are 100% equivalent to the classifications at the Housing Commission. Therefore, we do not just go by job titles, which can often be misleading, but we analyze each class description before we consider it as a comparator. Our methodology is to analyze each class description according to the factors listed below and we require that a classification's "likeness" be at approximately 70% of the matched classification to be included. Factors that we consider include:

- Education, experience, certification, license, and other training requirements;
- Knowledge, abilities, and skills required to perform the work;
- The scope and complexity of the work;

- The authority delegated to make decisions and take action;
- The responsibility for the work of others, program administration, and budget dollars;
- Problem solving/ingenuity;
- Contacts with others (both inside and outside of the organization);
- Consequences of action and decisions; and
- Working conditions.

We found that some of the Housing Commission’s classes were difficult to match due to the uniqueness of those classes to the Housing Commission. We were not able to find enough market data on the following classifications, and inferences between these and other classes that have an internal relationship were made.

- Community Liaison
- Docket Coordinator
- Housing Construction Specialist
- Loan Services Manager
- Loan Servicing Specialist
- Loan Underwriting Specialist
- Program Integrity Coordinator

It was difficult to find comparators for these classifications due to the Housing Commission’s uniqueness and its needs, operations, services, and programs, a combination that is not always found in other similar organizations.

When we do not find an appropriate match with one class, we often identify a broad or general comparator classification or we use “brackets” which can be functional or represent a span in scope of responsibility. A functional bracket means that the job of one classification at the Housing Commission is performed by two classifications at a comparator agency. A “bracket” representing a span in scope means that the comparator agency has one class that is “bigger” in scope and responsibility and one position that is “smaller,” where the Housing Commission’s class falls in the middle. However, the above classifications still did not yield sufficient matches in order to conduct a sound statistical analysis.

Other positions were difficult to match and we assigned matches using the 70% likeness criteria referred to above as best we could.

In all, of the original forty-five (45) benchmark classifications identified, we were able to collect sufficient data from all comparator agencies on thirty-eight (38) classifications.

### **Benchmarking Comparator Agencies**

The second and most important step in conducting a market salary study is the determination of appropriate agencies for comparison. The general objective in selecting survey agencies is to define the Housing Commission’s “labor market” as accurately as possible. A labor market is



generally a group of organizations with which an agency competes in terms of recruiting and retaining personnel.

However, due to the fact that the Housing Commission is a unique organization, we included several comparators that are not in its immediate geographic vicinity but that provide services similar to the Housing Commission's and that have a similar organizational structure.

In considering the selection of valid agencies for salary comparator purposes, a number of factors were taken into consideration:

- 1. Organizational type and structure** – We generally recommend that agencies of a similar size, providing similar services to that of the Housing Commission be used as comparators. As a rule, the more similar employers are in size and complexity, the greater the likelihood that comparable positions exist within both organizations. As mentioned several times above, the Housing Commission is a unique agency and therefore, we included some agencies that are smaller and some that are larger to provide a mix of agencies that thoroughly represent how the labor market compensates for levels or work similar to the Housing Commission's.

When it comes to the more technical types of classes at the staff level, such as administrative, accounting, eligibility, leasing, occupancy, housing finance, loan underwriting, and other technical classes, the size of an organization is not as critical as these classes perform fairly similar work due to its technical nature.

The difference in size of organization becomes more difficult when comparing classes at the management level. The scope of work and responsibility for management becomes much larger as an organization grows. Things such as management of a large staff, consequence of error, the political nature of the job, its visibility, etc., grow with larger organizations.

Because of the uniqueness of the Housing Commission's services, we originally contacted similar types of organizations, in both the public and private sectors. It should be noted that private companies are not obligated to participate in compensation studies, as is commonly accepted in the public sector. Nonetheless, some privately-run organizations agreed to participate.

In addition to housing agencies, we also included a few cities in the mix of comparator agencies. The goal is to identify a mix of agencies where some may be smaller, some of similar size, and some larger, within reasonable parameters.

- 2. Similarity of population, Housing Commission staff, and operational and capital improvement budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of agency services.
- 3. Scope of services provided** – Agencies providing the same services are ideal for comparators and most comparator agencies surveyed provide similar services to the Housing

Commission. A couple of comparators were selected that may not provide the same services but that are in the Housing Commission's immediate geography and therefore represent a competitive force within the Housing Commission's labor market.

- 4. Labor market** – In the reality of today's labor market, many agencies are in competition for the same pool of qualified employees. Individuals no longer necessarily live in the communities they serve. As mentioned above, typically, the geographic labor market area, where the Housing Commission may be recruiting from or losing employees to, would be taken into consideration when selecting potential comparator organizations. Furthermore, by selecting employers within a geographic proximity to the Housing Commission, the resulting labor market will be generally reflective of the region's cost of living, housing costs, growth rate, and other demographic characteristics.

Nonetheless, it is important to create a balance between the geographic labor market and the scope of services at the Housing Commission. Thus, we included agencies from the Los Angeles and San Francisco Bay Areas.

- 5. Compensation Philosophy** – Does the agency regularly conduct a market survey and once completed, how is this information applied? Many agencies pay to the average or median, others may pay to a higher percentile. In addition, salary ranges may be set strictly upon market base salary values or may include the total value of salaries and benefits when developing a compensation policy.

All of these elements were considered in selecting the group of comparator agencies. The Housing Commission management agreed on a list of comparator agencies and the following sixteen (16) agencies were used as comparators for the purposes of this market study:

1. Area Housing Authority of the County of Ventura
2. Centre City Development Corporation
3. City of Carlsbad
4. City of San Diego
5. Community Housing Works
6. County of San Diego Housing & Community Development Department
7. Housing Authority of the City of Los Angeles
8. Housing Authority of the County of Contra Costa
9. Housing Authority of the County of Santa Clara
10. Jamboree Housing Corporation
11. LINC Housing Corporation
12. Los Angeles County Community Development Commission
13. Oakland Housing Authority
14. San Diego Convention Center Corporation
15. Southern California Housing Development Corporation
16. Wakeland Housing & Development Corporation

## **Benchmarking Benefit Data Collection**

The last element requiring discussion prior to beginning a market survey is the specific benefit data that will be collected and analyzed. The following information was collected for each of the benchmarked classifications:

**Monthly Base Salary** – The top of the salary range. This was also factored into the total compensation costs. All figures are presented on a monthly basis.

**Employee Retirement** – This includes several figures, 1) the amount of the employee's retirement (e.g., PERS) contribution that is contributed by an agency, 2) the amount of an agency's Social Security contribution, and 3) any alternative retirement plan, either private or public where the employee's contribution is made by the agency on behalf of the employee.

In addition to the amount of the employer paid member contribution of PERS, we collected information on any enhanced PERS benefit, such as higher retirement formula, single-highest year, and other benefits.

**Insurance** – This is the maximum amount paid by an agency for employees and dependents for a cafeteria or flexible benefit plan and/or health, dental, vision, life, long-term and short-term disability, and employee assistance insurance.

**Leave** – Other than sick leave, which is usage-based, the number of days off for which the agency is obligated. All days have been translated into direct salary costs.

- **Vacation** – The number of vacation days available to all employees after five years of employment.
- **Holidays** – The number of holidays (including floating) available to employees on an annual basis.
- **Administrative/Personal Leave** – Administrative leave is normally the number of days available to management to reward for extraordinary effort (in lieu of overtime). Personal leave may be available to other groups of employees to augment vacation or other time off.

**Automobile** – This category includes either the provision of an auto allowance or the provision of an auto for personal use. If an automobile is provided, the standard monthly value is considered to be \$450.

**Deferred Compensation** – We captured deferred compensation provided to all members of a classification without the requirement for an employee to provide a matching or minimum contribution.

**Other** – This category includes any additional benefits available to all in the class.

Please note that all of the above benefit elements are entitlements, i.e., they are provided to all members of each comparator class. As such, they represent an on-going cost for which an agency must budget. Other benefit costs, such as sick leave, tuition reimbursement, and reimbursable mileage are usage-based and cannot be quantified on an individual employee basis.

For the On-site Property Manager classification and its matches, we also collected information regarding the cost of housing provided. Specifically, the On-site Property Managers at the Housing Commission receive free housing. With assistance from the Housing Commission, we were able to calculate a reasonable rent equivalent to the cost of the free housing provided, which we included in total compensation. For the matches to the On-site Property Managers, we asked each participating agency to also calculate the value of free housing, if provided, which we also included in total compensation.

In addition to the above list of benefits, the Housing Commission was also interested in gathering information on the following:

- Longevity: programs that provide all classifications with salary increases or lump-sum bonuses after a certain amount of years of services (usually 10, 15, 20, and/or 25 years).
- Variable Pay: forms of pay that are budgeted and considered as part of the employee's total compensation (in varying degrees), such as any types of performance incentive programs or other performance-based compensation.
- Tuition Reimbursement: reimbursement payments for approved educational courses.
- Employee Parking: reimbursement payments paid or incentives provided associated with employee parking.
- Commuter Assistance: reimbursement payments paid or incentives provided associated with commuting costs.

### **Data Collection**

Data was collected in April, May, and June 2009 through websites, planned telephone conversations with human resources, accounting, and/or finance personnel at each comparator agency, and careful review of agency documentation of classification descriptions, memoranda of understanding, organization charts, and other documents.

We believe that the salary data collection step is the most critical for maintaining the overall credibility of any study. We rely very heavily on the Housing Commission classification descriptions developed and approved during the classification part of the study, as they are the foundation for our comparison. HR staff of the comparator agencies were interviewed by telephone, whenever possible, to understand their organizational structure and possible classification matches.

All market base salary, benefits, and total compensation information can be found in Appendix II and a summary of the results can be found in Appendix I. For each surveyed class, there are three information pages:

- Base Salary (Top Step) Summary Data
- Benefit Detail (Monthly Equivalent Values)
- Monthly Total Compensation Cost Summary Data

Our analysis includes the average (statistical mean) and median (midpoint) comparator data for each benchmarked classification (assuming we were able to identify at least four matches). Our firm usually recommends reviewing the median, rather than the average, when evaluating the data. The median is the exact midpoint of all the market data we collected, with 50% of market data below and 50% of market data above. We recommend using the median methodology because it is not skewed by extremely high or low salary values while the average is more likely to get skewed by those values.

### **MARKET TOTAL COMPENSATION FINDINGS**

As mentioned above, all of the base salary, benefits, and total compensation data can be found in Appendix II of this report. The market base and total compensation salary findings for each class surveyed are listed below, using median base as well as median total compensation, arranged in descending order from the most positive median base salary percentile (above market) to the most negative (below market). The percentile represents the difference between the Housing Commission’s current base salary/total compensation for each classification and the median base salary/total compensation of the comparator agencies.

<b>Class Title</b>	<b>% Above/ Below Median Base Salary</b>	<b>% Above / Below Median Total Compensation</b>
Senior Vice President of Housing Development & Finance	6.8%	7.6%
Housing Inspector	-1.4%	-1.8%
Housing Specialist	-1.9%	-1.9%
Purchasing Technician	-3.2%	-13.8%
Executive Assistant to the President & CEO	-4.4%	-0.9%
Client Services Receptionist	-5.4%	-9.0%
Workforce and Economic Development Manager	-6.0%	-8.3%
Housing Programs Manager	-7.6%	-5.8%
Resident Initiatives Coordinator	-8.8%	-9.2%
Housing Assistant	-10.1%	-15.3%
Budget Analyst	-10.2%	-13.2%
Inspection Coordinator	-10.2%	-14.8%
Communications Manager	-10.4%	-17.8%
Budget Manager	-10.8%	-15.8%
Administrative Assistant	-10.9%	-18.7%
Office Assistant	-11.6%	-22.1%
Management Analyst	-11.8%	-21.3%
Housing Construction Manager	-11.9%	-16.7%
Human Resources Analyst	-12.5%	-17.2%

<b>Class Title</b>	<b>% Above/ Below Median Base Salary</b>	<b>% Above / Below Median Total Compensation</b>
Accountant	-12.6%	-11.6%
Maintenance Technician	-15.1%	-15.1%
Vice President of Rental Assistance Programs	-16.1%	-20.6%
Housing Supervisor	-17.7%	-17.0%
Human Resources Manager	-17.7%	-23.6%
Housing Development Manager	-17.7%	-19.2%
Accounting Technician	-18.9%	-18.4%
Vice President of Asset Management	-19.5%	-21.3%
Accounting Supervisor	-19.5%	-19.2%
Information Technology Manager	-22.4%	-32.0%
Program Analyst	-24.3%	-25.4%
Information Technology Analyst	-25.9%	-26.3%
Vice President of Community Relations	-29.8%	-33.8%
Vice President of Financial Services	-33.1%	-20.9%
Vice President of Business Services	-38.6%	-36.3%
On-Site Property Manager	-42.7%	-22.2%
Information Technology Technician	-53.2%	-54.7%
Financial Analyst	Proposed *	Proposed *
Community Liaison	Insufficient Data	Insufficient Data
Docket Coordinator	Insufficient Data	Insufficient Data
Housing Construction Specialist	Insufficient Data	Insufficient Data
Loan Services Manager	Insufficient Data	Insufficient Data
Loan Servicing Specialist	Insufficient Data	Insufficient Data
Loan Underwriting Specialist	Insufficient Data	Insufficient Data
Program Integrity Coordinator	Insufficient Data	Insufficient Data

\* This was a new classification that did not have an assigned salary range at the time of data collection. Therefore, no percentage difference to the market could be calculated.

**Base Salaries**

Market *base salary median* results show that thirty-five (35) classifications at the Housing Commission are paid below the market median. Generally, results within 5% of the market median are considered to be competitive with the market. Of the 35 classifications, four (4) are paid below the market median by less than 5%, four (4) are paid by more than 5% and less than 10%, nineteen (19) are paid below the market by more than 10% and less than 20%, and eight (8) are paid below the market by more than 20%.

One (1) classification is paid above the market median by more than 5% but less than 10%. Seven (7) classifications did not have enough comparators to determine the market median and one (1) classification is new so the market median could not be calculated.

## **Total Compensation**

Market *total compensation median* results show that thirty-five (35) classifications are paid below market median. Three (3) of these classes are paid below the market median by 5% or less and considered to be competitive with the market. Four (4) classifications are paid below market median by more than 5% and less than 10%. Fifteen (15) classifications are paid below market median by more than 10% and less than 20%. Thirteen (13) classes are paid below market median by more than 20%.

Two (2) classifications are paid above the market median. Both of these classifications are paid above the market median by more than 5% and less than 10%.

Overall, these differences between market base salaries and total compensation indicate that the Housing Commission's benefit package, in terms of cost, is slightly less than that of the market. Further analysis indicates that, on average, classifications are 15.4% below the market median for base salaries, while that figure changes to 17.4% below market when we look at total compensation.

## **Benefits**

Overall, the resulting differences between base salaries and total compensation suggest that the Housing Commission's benefits package is less competitive than that of the comparators agencies. Further analysis into these differences reveals one major factor:

- The Housing Commission's insurance benefits package appears to be significantly below the market. Insurance benefit items typically include insurance premiums paid for by the agency for the *employee plus family* level of coverage (or the maximum premiums that the agency pays on behalf of its employees if family coverage is not available), such as health, dental, vision, life, long-term and short-term disability, and employee assistance program. Overall, eleven (11) of the sixteen (16) comparator agencies pay a sometimes significantly higher dollar amount for insurance premiums compared to the Housing Commission.

Since the Housing Commission's benefits are less competitive than those of the comparator agencies, thereby bringing the Housing Commission's total compensation package further away from the market compared to base salaries, we base our recommendations on base salaries and recommend addressing benefits as a separate issue.

## **INTERNAL SALARY RELATIONSHIPS**

Internal equity between certain levels of classification is a fundamental factor to be considered when making salary decisions. When conducting a market compensation survey, results can often show that certain classifications that are aligned with each other are not the same in the

outside labor market. However, as an organization, careful consideration needs to be given to these alignments because they represent internal value of classifications within job families, as well as across the organization.

While analyzing internal relationships, the same factors were considered that we used in constructing the Housing Commission's classification plan, allocating positions to specific classifications within the plan, and comparing the Housing Commission's current classifications to the labor market during the compensation study. Those factors are listed on pages 2 and 3 of this report.

In addition, when considering an appropriate salary range level, there are certain standard human resources practices that are normally applied, as follows:

- As mentioned above, a salary within 5% of the average or median is considered to be competitive in the labor market for salary survey purposes because of the differences in compensation policy and actual scope of the position and its requirements. However, a closer standard can be adopted by the Housing Commission.
- Certain internal percentages are often applied. Those that are the most common are:
  - ❖ The differential between a trainee/entry-level and experienced/journey-level class in a series (I/II or Trainee/Experienced) is generally 10% to 15%;
  - ❖ A lead or advanced journey-level (III or Senior-level) position is generally placed 10% to 15% above the lower experienced level; and
  - ❖ A full supervisory position is normally placed at least 15% to 25% above the highest level supervised, depending upon the breadth and scope of supervision.
  - ❖ We can also make internal equity adjustments between classifications such as Director/Department Head and/or Manager/Superintendent, especially within one department.
- When a market or internal equity adjustment is granted to one class in a series, the other classes in the series are also adjusted accordingly to maintain internal equity.

It is important to consider the organizational "worth" of a classification. Although our recommendations are generally market driven, we also weighed internal equity very carefully and determined the most appropriate recommendations based on both market results and organizational worth.

Internal relationships were considered utilizing the factors and practices outlined above. Consequently, not all currently existing Housing Commission classes were market surveyed as we can make certain inferences between classes that have an internal relationship. For example, we identified Program Analyst, Information Technology Analyst, and Administrative Assistant as benchmark classes. From these classes we can draw internal relationships and make inferences in terms of salary to classes such as Senior and Principal Program Analyst, Senior and Principal Information Technology Analyst, and Senior Administrative Assistant, respectively.



Although salary information was collected on most of the proposed survey classes, we could not make a sound statistical analysis for seven (7) of the benchmarked classifications due to lack of data. In addition, during the classification process, we created several class series, of which typically only the journey-level class was benchmarked (as explained above). For all classifications that were not benchmarked or for which we did not find enough comparators, internal alignments with other classifications will need to be considered, either in the same class series or with those classifications that have similar scope of work, level of responsibility, and “worth” to the Housing Commission. These internal relationships need to be analyzed carefully, using the factors described on pages 2 and 3 of this report. Where it is difficult to ascertain internal relationships due to unique qualifications and responsibilities, reliance can be placed on past internal relationships. It is important for Housing Commission management to carefully review these internal relationships and determine if they are still appropriate given the current market data.

For example, the compensation study showed that the Vice Presidents are paid at varying compensation levels in the market, according to the market comparators we identified for each class. To a certain degree, this may be a result of the number of matches found for each of the classes, the differences in actual functional assignments at the management level within each of the comparator agencies, as well as how/at which level the other agencies assess the “worth” of such classes to the organization. Due to historical relationships at the Housing Commission and the similarity in scope of work and level of responsibility, we recommend aligning the Vice Presidents at salary range UR53, which is the midpoint of the varying market medians (ranging from UR49 to UR56, rounding up).

A similar method was used for the new mid-management level, which we recommend placing at salary range UR37, which is the midpoint of the varying market medians (ranging from UR34 to UR40).

The Housing Commission may want to make other internal equity adjustments as it implements a compensation strategy. It may decide to make certain adjustments to the market data when it comes to classifications with similar scope of work, level of responsibility, and “worth” to the Housing Commission, but where market survey results places them at different levels. This market survey is only a tool to be used by the Housing Commission to determine market indexing and salary determination. A summary of each class’ current base salary and total compensation and the percentage difference to the market mean and median is found in Appendix I.

## **RECOMMENDATIONS**

### **Pay Philosophy**

The Housing Commission has many options regarding what type of compensation plan it wants to implement. This decision will be based on what the Housing Commission’s pay philosophy is, at which level it desires to pay its employees compared to the market, whether it is going to

consider additional alternative compensation programs, and how great the competition is with other agencies over recruitment of a highly-qualified workforce.

Another consideration will be the cost of the Housing Commission's pay philosophy. Currently, almost all of the Housing Commission's classifications are paid below the market median. Bringing all employees to the market median would denote a significant increase of the Housing Commission's payroll expenses and may not be feasible to accomplish with one immediate adjustment.

### **Options for Implementation**

While the Housing Commission may be interested in bringing all salaries to the market median, in many cases this goal may not be reached with a single adjustment. In this case, one option is to use a phased implementation approach. Normally, if the compensation implementation program must be carried over months or years, the classes that are farthest from the market median should receive the greatest equity increase (separate from any cost of living increase). If a class falls within five percent (5%) of the market median, it would be logical to make no equity adjustment in the first round of changes. However, if a class is more than 5% (or in this case, more than 10% or 20%) below the market median, a higher percentage change may be initially warranted to begin minimizing the disparity.

Another option is to move employees into the newly proposed compensation structure, i.e., within the salary range that is recommended for each class based on this market study and to the step or place within the new range that is closest to their current compensation. This may only result in slight salary adjustments (for those employees remaining within the step system) or in no initial changes at all (for those employees who are either staying or are recommended for moving to the minimum/mid-point/maximum salary range model). Some employees' current salaries are so far below market that their current compensation (even if they are at the top of their current salary range) falls below even the bottom of the newly recommended range. In those cases, larger adjustments may need to be considered to move those employees at least to the bottom of the new salary range.

The Housing Commission may spend additional time to go through a process of deliberation and decision-making as to what compensation philosophy it should implement to attract, motivate, and retain a high-quality workforce. However, it may want to consider adjusting those classifications' salaries that are currently below the market median as soon as possible, assuming that incumbents' performance meets the Housing Commission's level of expectation.

### **Proposed Monthly Salary Plan**

Currently, for Executive Management classifications, the Housing Commission's salary schedule is composed of 50 ranges with no set percentage between ranges and the difference between the minimum and maximum of each range also varies (ranging from 22% to 53%). Our recommendation for all *unrepresented* classifications is to implement a salary schedule with 67 ranges with a 2.5% differential between each range, a 40% differential between the minimum

and maximum of each range, and a midpoint that is also shown for each range. By having a set percentage between ranges allows for ease of administration and an enhanced capability to analyze internal relationships. Also, as a side note, the 40% between the minimum and maximum is equivalent to the average of the current differences between the minimum and maximum of the salary ranges and is a common difference found in the market.

For Staff classifications, the Housing Commission's current salary schedule is composed of 42 7-step ranges with 5% between steps 1 and 2 and 2 and 3, and 2.5% between the remaining steps, thus resulting in an overall differential of 21.5% between step 1 and step 7. The differential between the ranges is 5%. Our recommendation for all *represented* classifications is to implement a salary schedule with 60 ranges with 2.5% between each range and 10 steps with 2.5% between each step.

Appendix III contains the proposed salary schedules for both unrepresented and represented classifications.

### **Proposed Salary Range Placements**

Appendix IV illustrates the proposed salary range placement for each classification based on the market data and an internal relationship analysis. The spreadsheet also includes our rationale for each recommended placement and the projected percentage change. We made the following calculation: we used the market base salary median findings for each surveyed classification and placed them into the proposed monthly salary schedule, in the salary range whose top step or maximum is closest to the market median number. In addition, we modified that placement in certain instances where it seemed warranted based on internal relationships and/or compaction issues.

It should be noted that for the On-site Property Manager, the recommended range placement was based on total compensation, not base salary. The reason for this recommendation is that this classification receives a lower base salary because incumbents receive free housing. The total compensation figures for the On-site Property Manager and the labor market matches we identified include the cost of housing received. For this classification, we made the following calculation: we used the percentage difference between the market total compensation median finding and the Housing Commission's current total compensation figure; we then multiplied the Housing Commission's current salary with that percentage for the surveyed classification; and placed the resulting dollar value into the current monthly salary schedule, at the salary range closest to the resulting number.

For all classifications, this primary implementation procedure must be completed only at the initial time of implementation. In the future, if the Housing Commission decides to implement annual across-the-board COLA increases, only the salary schedule that we developed needs to be increased by the appropriate percentage and each individual salary range will move up with this adjustment. This will ensure that the internal salary relationships are preserved and the salary schedule remains structured and easily administered.

## **USING MARKET DATA AND THIS REPORT AS A TOOL**

We wish to reiterate our recommendation that this report and our findings are meant to be a tool for the Housing Commission to create and implement an equitable compensation plan. Compensation strategies are designed to attract and retain high-quality staff. However, financial realities and the Housing Commission expectations may also come into play when determining appropriate compensation philosophies and strategies. The collected data represents a market survey that will give the Housing Commission an instrument to make future compensation decisions.

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

# **VOLUME II**

## **Appendix I**

### **Results Summary**

**Appendix I**  
**San Diego Housing Commission**  
**Results Summary**  
**Data Gathered By June 2009**

Classification	Top Monthly Salary Data					Total Monthly Compensation Data				
	SDHC Top Monthly Salary	Average	% above or below	Median	% above or below	SDHC Total Monthly Compensation	Average	% above or below	Median	% above or below
Vice President of Business Services	\$9,240	\$12,225	-32.3%	\$12,812	-38.6%	\$12,786	\$16,703	-30.6%	\$17,429	-36.3%
Vice President of Financial Services	\$9,240	\$12,456	-34.8%	\$12,296	-33.1%	\$12,786	\$16,669	-30.4%	\$15,457	-20.9%
Vice President of Community Relations	\$9,240	\$12,030	-30.2%	\$11,995	-29.8%	\$12,786	\$16,607	-29.9%	\$17,109	-33.8%
Senior Vice President of Real Estate	\$12,500	\$11,820	5.4%	\$11,645	6.8%	\$17,026	\$15,862	6.8%	\$15,728	7.6%
Vice President of Asset Management	\$9,240	\$11,501	-24.5%	\$11,043	-19.5%	\$12,786	\$15,484	-21.1%	\$15,505	-21.3%
Vice President of Rental Assistance Programs	\$9,240	\$10,941	-18.4%	\$10,724	-16.1%	\$12,786	\$15,195	-18.8%	\$15,419	-20.6%
Information Technology Manager	\$7,010	\$9,047	-29.1%	\$8,580	-22.4%	\$9,681	\$13,243	-36.8%	\$12,779	-32.0%
Housing Development Manager	\$7,010	\$8,198	-17.0%	\$8,252	-17.7%	\$9,681	\$11,260	-16.3%	\$11,541	-19.2%
Human Resources Manager	\$7,010	\$8,244	-17.6%	\$8,252	-17.7%	\$9,681	\$11,685	-20.7%	\$11,967	-23.6%
Housing Construction Manager	\$7,010	\$8,437	-20.4%	\$7,847	-11.9%	\$9,681	\$11,786	-21.7%	\$11,299	-16.7%
Budget Manager	\$7,010	\$8,350	-19.1%	\$7,767	-10.8%	\$9,681	\$11,527	-19.1%	\$11,214	-15.8%
Communications Manager	\$7,010	\$8,004	-14.2%	\$7,735	-10.4%	\$9,681	\$11,322	-17.0%	\$11,403	-17.8%
Housing Programs Manager	\$7,010	\$7,559	-7.8%	\$7,543	-7.6%	\$9,681	\$10,317	-6.6%	\$10,245	-5.8%
Workforce and Economic Development Manager	\$7,010	\$7,602	-8.5%	\$7,431	-6.0%	\$9,681	\$10,388	-7.3%	\$10,487	-8.3%
Accounting Supervisor	\$6,053	\$7,286	-20.4%	\$7,235	-19.5%	\$8,458	\$10,215	-20.8%	\$10,081	-19.2%
Information Technology Analyst	\$5,489	\$7,097	-29.3%	\$6,909	-25.9%	\$7,613	\$9,959	-30.8%	\$9,618	-26.3%
Project Manager	\$6,675	\$6,965	-4.3%	\$6,884	-3.1%	\$9,253	\$9,684	-4.7%	\$10,088	-9.0%
Program Analyst	\$5,231	\$6,440	-23.1%	\$6,500	-24.3%	\$7,283	\$9,014	-23.8%	\$9,132	-25.4%
Housing Supervisor	\$5,489	\$6,599	-20.2%	\$6,460	-17.7%	\$7,738	\$9,408	-21.6%	\$9,057	-17.0%
Financial Analyst	Proposed	\$6,341	N/A	\$6,348	N/A	Proposed	\$9,264	N/A	\$9,135	N/A
Human Resources Analyst	\$5,231	\$5,736	-9.6%	\$5,883	-12.5%	\$7,283	\$8,322	-14.3%	\$8,534	-17.2%
Management Analyst	\$5,231	\$6,022	-15.1%	\$5,848	-11.8%	\$7,283	\$8,546	-17.3%	\$8,833	-21.3%
Executive Assistant to the President & CEO	\$5,580	\$5,625	-0.8%	\$5,824	-4.4%	\$7,982	\$8,194	-2.7%	\$8,050	-0.9%
Budget Analyst	\$5,231	\$5,804	-11.0%	\$5,764	-10.2%	\$7,283	\$8,520	-17.0%	\$8,243	-13.2%
Inspection Coordinator	\$4,980	\$5,539	-11.2%	\$5,489	-10.2%	\$6,962	\$7,890	-13.3%	\$7,995	-14.8%
Accountant	\$4,744	\$5,460	-15.1%	\$5,341	-12.6%	\$6,661	\$7,861	-18.0%	\$7,432	-11.6%
Information Technology Technician	\$3,375	\$5,064	-50.0%	\$5,169	-53.2%	\$4,911	\$7,528	-53.3%	\$7,605	-54.8%
Resident Initiatives Coordinator	\$4,306	\$4,604	-6.9%	\$4,684	-8.8%	\$6,101	\$6,638	-8.8%	\$6,661	-9.2%
Housing Specialist	\$4,517	\$4,698	-4.0%	\$4,605	-1.9%	\$6,371	\$6,811	-6.9%	\$6,493	-1.9%
Housing Inspector	\$4,306	\$4,478	-4.0%	\$4,368	-1.4%	\$6,101	\$6,494	-6.5%	\$6,209	-1.8%
On-Site Property Manager	\$3,061	\$4,531	-48.0%	\$4,367	-42.7%	\$5,871	\$6,850	-16.7%	\$7,173	-22.2%
Accounting Technician	\$3,539	\$4,164	-17.6%	\$4,208	-18.9%	\$5,122	\$6,156	-20.2%	\$6,064	-18.4%
Administrative Assistant	\$3,716	\$4,101	-10.3%	\$4,120	-10.9%	\$5,348	\$6,216	-16.2%	\$6,347	-18.7%
Housing Assistant	\$3,716	\$4,159	-11.9%	\$4,092	-10.1%	\$5,348	\$6,225	-16.4%	\$6,165	-15.3%
Maintenance Technician	\$3,536	\$3,886	-9.9%	\$4,072	-15.1%	\$5,117	\$5,822	-13.8%	\$5,892	-15.1%
Purchasing Technician	\$3,375	\$3,484	-3.2%	\$3,483	-3.2%	\$4,911	\$5,315	-8.2%	\$5,586	-13.8%
Office Assistant	\$2,910	\$3,287	-12.9%	\$3,249	-11.6%	\$4,318	\$5,238	-21.3%	\$5,273	-22.1%
Client Services Receptionist	\$2,910	\$3,176	-9.1%	\$3,066	-5.4%	\$4,318	\$5,027	-16.4%	\$4,705	-9.0%
Community Liaison	\$6,053		Insufficient Data for Analysis			\$8,333		Insufficient Data for Analysis		
Docket Coordinator	\$4,744		Insufficient Data for Analysis			\$6,661		Insufficient Data for Analysis		
Housing Construction Specialist	\$5,765		Insufficient Data for Analysis			\$7,965		Insufficient Data for Analysis		
Loan Services Manager	\$7,010		Insufficient Data for Analysis			\$9,556		Insufficient Data for Analysis		
Loan Servicing Specialist	\$4,744		Insufficient Data for Analysis			\$6,661		Insufficient Data for Analysis		
Loan Underwriting Specialist	\$4,306		Insufficient Data for Analysis			\$6,101		Insufficient Data for Analysis		
Program Integrity Coordinator	\$4,744		Insufficient Data for Analysis			\$6,661		Insufficient Data for Analysis		
			-16.7%		-15.4%			-17.8%		-17.4%