



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

15160 Jackson Road, Rancho Murieta, CA 95683

Office - 916-354-3700 * Fax - 916-354-2082

PERSONNEL COMMITTEE

(Directors Tim Maybee and Randy Jenco)

Special Meeting

October 14, 2021 at 10:00 a.m.

This meeting will be held via ZOOM video conference only. You can join the conference by (1) logging on to <https://us02web.zoom.us/j/85072711450> entering Meeting ID no. 850 7271 1450, and using the audio on your computer, or (2) dialing into 1-669-900-9128 and entering the meeting code 850 7271 1450. Those wishing to join with audio only can simply call the telephone number above and enter the code. Participants wishing to join the call anonymously have the option of dialing *67 from their phone. Please refer to your telephone service provider for specific instructions. **PLEASE NOTE – MOBILE DEVICE USERS MAY NEED TO INSTALL AN APP PRIOR TO USE AND MAC AND PC DESKTOP AND LAPTOP USES WILL REQUIRE YOU TO RUN A ZOOM INSTALLER APPLICATION – PLEASE FOLLOW DIRECTIONS AS PROVIDED BY ZOOM. IT IS RECOMMENDED YOU ATTEMPT TO LOGIN AT LEAST 5 MINUTES BEFORE THE START OF THE MEETING.**

AGENDA

1. Call to Order
2. Comments from the Public
3. Discuss Resolution Recognizing Gate Officer Richard Dias
4. Review Updates to the Personnel and Pay for Performance Manuals
5. Discuss 2021 Salary Survey
6. Discuss Unrepresented Employee Salary
7. Discuss Gate and Patrol Officer Reclassifications
8. Request for Additional Full Time Staffing
9. Discussion of District Employee Survey
10. Discuss Policy on Workplace Conduct
11. Directors & Staff Comments/Suggestions
12. Adjournment

"In accordance with California Government Code Section 54957.5, any writing or document that is a public record, relates to an open session agenda item and is distributed less than 24 hours prior to a special meeting, will be made available for public inspection in the District offices during normal business hours. If, however, the document is not distributed until the regular meeting to which it relates, then the document or writing will be made available to the public at the location of the meeting."

In compliance with the Americans with Disabilities Act and Executive Order No. N-29-20, if you are an individual with a disability and you need a disability-related modification or accommodation to participate in this meeting or need assistance to participate in this teleconference meeting, please contact the District Office at 916-354-3700 or awilder@rmcsd.com. Requests must be made as soon as possible.

Note: This agenda is posted pursuant to the provisions of the Government Code commencing at Section 54950. The date of this posting is October 12, 2021. Posting locations are: 1) District Office; 2) Post Office; 3) Rancho Murieta Association; 4) Murieta Village Association.

RESOLUTION 2021-04

IN RECOGNITION OF RICK DIAS

WHEREAS, Rick Dias worked with Rancho Murieta Community Services District as a Gate Officer since May 12 1994; and

WHEREAS, Rick has been a part of the success of the Community Services District; and

WHEREAS, Rick has endeared himself with many friends and acquaintances in the District and Rancho Murieta community; and

WHEREAS, Rick's unwavering commitment, willingness and ability to understand and respond to the concerns of the people of Rancho Murieta, has made a substantial contribution to the betterment of the Community of Rancho Murieta.

NOW THEREFORE BE IT PROCLAIMED, this 20th day of October in the year 2021, that the Board of Directors of the Rancho Murieta Community Services District, do hereby commend Rick Dias for his time-honored legacy of dedication, enthusiasm and outstanding public service given to the Rancho Murieta community for the past twenty-seven years.

Tim Maybee, Board President

Randy Jenco, Vice - President

Linda Butler, Director

John Merchant, Director

Martin Pohll, Director

MEMORANDUM

Date: October 12, 2021
To: Personnel Committee
From: Paula O'Keefe, Director of Administration
Subject: Personnel and Pay for Performance Manual Updates

RECOMMENDED ACTION

District Staff recommends the Personnel Committee move the recommended changes to the Personnel manual and Pay for Performance manual to the October 20th Board meeting for approval.

BACKGROUND

In July of 2020, General Manager Tom Hennig commissioned a compensation study for all classification within the District. The compensation study was to assist with labor negotiations for represented staff and found that the unrepresented staff salaries were severely below market.

In late August, 2021, Koff & Associates was asked to revisit the draft study and update the information in order to allow the District for Board presentation. Late September, the District received the draft report from Koff & Associates, which highlighted finding of importance:

“Historically, including a recent 2020 survey, the District’s benefits package does not contribute to its competitive position compared to the market and, therefore, it is recommended that salary decisions should be based on base salary market results versus total compensation; benefit competitiveness should be evaluated separately.”

After reviewing the study in full, staff reviewed benefits to other agencies used in the comparison and found that while the District’s health benefits are comparable, other compensable benefits are lacking or nonexistent. In the last 10 months the District has experienced significant turnover and has been unable to retain and hire quality staffing. For example, if a potential candidate has a choice between working for the District with a competitive salary, but another agency is providing a competitive salary package that includes increased leave accruals, administrative leave, stipends, etc, the potential candidate will decline our opportunity for a more favorable package.

Staff also reviewed the work schedule and surveyed nearly all employees on preference. Because of the District’s remote location, many employees travel upwards of 30+ miles one way to work, five days a week. Depending on the commute, this could mean at least two hours a day, driving to and from work. Because working remotely is not an option, this extends an employees’ day from 9 hours (8 hours plus hour lunch) to an eleven hour work day. While discussing with staff the need for increased work life balance to include an alternate work schedule, many employees expressed the desire for a half hour lunch as an hour lunch is too long since most employees do not reside in the area. Just a couple of the larger benefits of the alternate work schedule are:

- Better attendance and productivity: The extra hour worked allows employees the ability to manage personal appointments without using leave balances to take time off of work;

- Reducing the lunch period to a half hour allows field workers the ability to shorten their workday during hot summer months;
- Potential to reduce overtime: While overtime is not a large issue, it can become one when staff shortages occur. Adding an extra regular hour to the workday has the potential to reduce overtime costs by allowing staff to complete their day to day tasks without incurring additional worked hours beyond their regular day;
- Better moral: staff have expressed the need to spend more time with their families and having a five day a week (not including standby callbacks and overtime) extends well into their personal family time.

Staff have prepared a proposal to adjust the Personnel Manual to increase these items, as well as correcting other outdated language found within the Personnel Manual. Staff is requesting the following changes be made:

1. Section 3.15 - remove classifications that are no longer appointed by the Board.
2. Section 3.17 - correct pre-employment screening process to require the Live Scan prior to employment orientation.
3. Section 5.01 (a) - include alternate work schedules, allowing the Board of Directors to change the employee work schedule from 5/80 to 9/80 with a half hour lunch.
4. Section 5.01 (b) - correct language to the standard workweek. The current workweek begins on a Saturday and ends on a Friday, however it should begin on Sunday and end on a Saturday.
5. Section 5.03 (c), (d) – correct work week time/day
6. Section 5.08 (c), (j) – removal of Immediate family spouses language, include language to distinguish who is eligible for Administrative leave and increase the Administrative Leave from five days (40 hours) to ten days (80 hours). Includes a correction to the start date of the accrual to align with the fiscal year instead of calendar year and provisions allowing carry over of unused leave balances.
7. Section 5.10 - correction to allow full compensation of holiday hours IF District moves to alternate work schedule.
8. Section 5.12 - increases the vacation accrual rate. This allows the District to be competitive within the benefits package and is aligned with other agencies' accruals.
9. Section 5.21 (b) - remove
10. Section 5.23 (b) - correction to reflect California law
11. Section 7.03 (a), (b) - correction to align with MOU – probationary period is 12 months
12. Section 8.01 – creates a cap on the amount of tuition reimbursement an employee may receive annually
13. Section 12.04 - remove General Manager, corrects language on probationary period, add designee to allow for separation of duties
14. Section 12.09 - removes language requiring the Board of Directors to hold an appeal hearing

Staff have prepared a proposal to adjust the Pay for Performance Manual to include compensation for exempt employees and correct other outdated language. Staff is requesting the following changes be made:

1. Remove redundant language referring to MOU for represented employees
2. Added additional compensation for exempt employees.
 - a. The Technology and Equipment compensation replaces the reimbursement allowance the District already provides.
 - b. The Annual Deferred Compensation provides a 2.5% District matching contribution towards the exempt employees' base annual salary.
3. Corrected various grammatical, spelling errors and removed dates.

SUMMARY

Staff have met with the Union steward regarding changes to the work schedule and have submitted the changes to the District's attorneys for review. At this time, the Union has no concerns with updating the work schedule based on feedback provided by the employees. Upon approval from the Personnel Committee and the District's attorneys, staff will provide updated information to the Board on October 20th, 2021.

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CERTIFICATE OF RECEIPT OF RULES

TO RANCHO MURIETA COMMUNITY SERVICES DISTRICT EMPLOYEES:

Welcome to Rancho Murieta Community Services District. I personally hope that you will enjoy working at Rancho Murieta Community Services District and that you will find your work interesting and challenging. As a service-oriented organization, our goal is to conduct our daily activities in a manner reflecting pride, efficiency, and competence with a friendly and courteous attitude.

This PERSONNEL MANUAL has been adopted by the Board of Directors of the Rancho Murieta Community Services District as its regular operating policies. It is designed to be a working guide for both employees and supervisors in the day-to-day operations of the District's personnel program. The text of the manual is not intended to be a legal contract with the employee but rather an attempt to describe generally the way the organization works. The rules and regulations contained in this booklet may not be modified by your supervisor or the General Manager, without the approval of the Board of Directors. However, the General Manager has been granted reasonable administrative latitude to interpret and apply these rules. As time goes on and we encounter some unforeseen problems in administering these rules, or circumstances warrant change, these rules may be modified from time to time as the Board of Directors sees fit. You will be made aware of any official changes to this document. Please insert the new material as you receive it.

This manual should increase understanding, eliminate the need for personal decisions on matters of organizational policy, and help assure uniformity throughout the organization. It affirms that the District retains sole discretion over determination of execution of District goals and policies. It also affirms the at-will status of District employees and does not constitute an employee contract.

Please read this booklet carefully. Do not hesitate to ask for clarification or guidance from your supervisor or your Department Manager.

After reading these rules, **TEAR OUT THE ATTACHED SHEET, SIGN IT, AND RETURN IT TO THE PERSONNEL DEPARTMENT** or designated person within 10 working days of receipt of these rules.

Sincerely,

~~Mark Martin~~ Tom Hennig
General Manager

RANCHO MURIETA COMMUNITY SERVICES DISTRICT
15160 Jackson Road - PO Box 1050
Rancho Murieta, CA 95683
(916) 354-3700

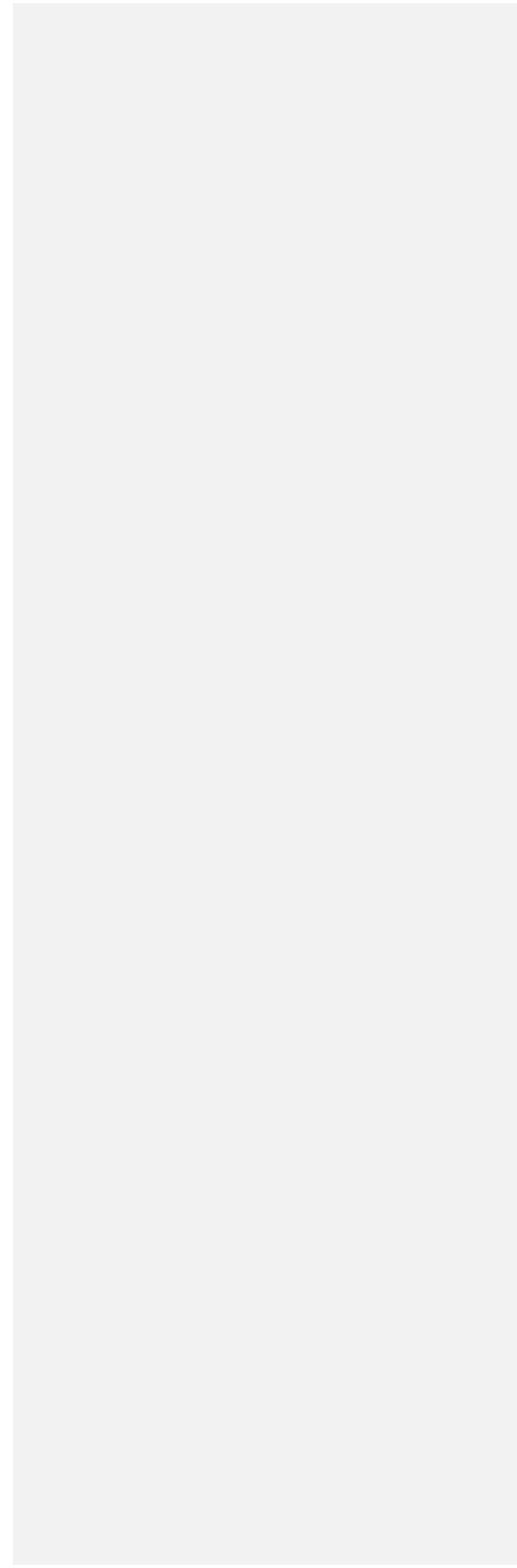
Employee Statement:

I have read the Rancho Murieta Community Services District's PERSONNEL MANUAL, and I understand I am responsible for compliance with these rules.

NAME: _____
(Please Print)

SIGNATURE: _____

DATE: _____



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

PERSONNEL MANUAL

SECTION 1.00 - GENERAL PROCEDURES

- 1.01 Title. This Manual shall be known as the "Personnel Manual" and may be cited as such.
- 1.02 Purpose. The purpose of the Personnel Manual, as described in the Statement of Purpose on page 1, is to be used to provide guidance for the development and application of personnel management policies for the District.
- 1.03 Non-Discrimination: Employment practices of the District shall fully comply with federal and state equal employment opportunity laws.

- (a) The District shall not discriminate for or against any person based upon race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status, sex, age over 40, or political opinion or affiliation. The District recruits, hires, trains and promotes qualified persons at all levels of the work force; and provides reasonable accommodation to qualified employees and applicants with a known disability who can perform the essential functions of a job.

It is District policy to maintain a work environment free from discriminatory insult, intimidation or harassment due to race, color, religion, sex, age, physical handicap or national origin. Any incident of discriminatory insult, intimidation, or harassment in any form should be promptly reported in accordance with Policy #2011-04.

- (b) The District is committed to providing a work environment for its employees that is free of harassment of any nature. Acts of sexual harassment as well as harassment because of race, religious creed, color, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation or any other basis protected by federal, state or local law, ordinance or regulation by employees, supervisors, managers, or directors, are prohibited employment practices and are subject to sanctions and disciplinary measures, up to and including termination of employment or Board of Directors sanction.

** Refer to District Policy 2011-04, Harassment of Any Nature (including Sexual Harassment) for policy details and complaint process*

- 1.04 District Rights: The Board of Directors and such persons as the Board may authorize, has the exclusive right, in accordance with applicable laws and regulations, to take certain actions including, but not limited to, the following:
- (a) Directing employees in the performance of their duties
- (b) Hiring, promoting, transferring, classifying and assigning employees
- (c) Disciplining or dismissing employees
- (d) Determining the District's purpose, budget and organization

- (e) Determining and effectuating methods of implementing and foregoing
- (f) District retains, solely and exclusively, all the rights, powers and authority exercised or held prior to the execution of any labor agreement except as expressly limited by a specific provision of that agreement.

- 1.05 Administration of Rules. The General Manager, subject to the direction of the Board, shall be responsible for the administration of the rules set forth in this Manual. The General Manager is responsible for the interpretation and application of these rules, subject to review by the Board of Directors in cases of disputes.
- 1.06 Delegation of Powers by the General Manager. The General Manager, in his or her discretion, may delegate any of his or her authority set forth in these rules, as he or she may deem appropriate and necessary.
- 1.07 Tenure of Employment. The tenure of every employee shall be based upon continuing satisfactory service, maintaining certifications and licenses that are required by the job, proper personal conduct for the position, as determined by the General Manager, as well as the continued need for the work performed and the availability of funds.
- 1.08 Employment-At-Will Policy. All District employees serve at the will of the District. The District and the employee agree that the District may terminate the employment of any employee regardless of employment status or tenure with the District. Such termination may be made with or without cause. Similarly, the employee may terminate his or her employment with the District at any time with or without cause.
- 1.09 Anti-Nepotism Policy: It is the policy of the District that Immediate Family members, as defined in Section 2.20, and their spouses, of District employees or of elected or appointed officials may only be employed as either Full-Time or Part-Time employees, or as independent contractors of the District when all of the following criteria are met.
 - 1. Such employment does not adversely affect safety, morale, security or supervision, and,
 - 2. Immediate Family members neither initiate nor participate in making recommendations or decisions that would directly affect the employment status of their spouses or relatives. These recommendations/decisions include but are not limited to selection, appointment, retention, work assignments, promotion, demotion, or salary.

The District may prohibit employment or may reassign Immediate Family members if, in its sole discretion, it finds that any of the above criteria are not met.

If two persons should marry while both are employed by the District, they may continue their employment provided that they meet both of the criteria referenced above. In addition, if one spouse must change his/her job or department so that the above-referenced criteria are met, that choice shall be made by the couple within 30 days of the marriage. However, if the couple does not make this decision within 30 days, the employee with less seniority shall be transferred. If both employees have the same amount of seniority, the District's decision regarding which employee shall be transferred shall be based upon the necessity of operating the District in an efficient manner.

- 1.10 Confidential Nature of Personnel Records. Personnel records such as applications, examination papers, performance reports, and disciplinary actions shall be considered confidential, and upon request shall be made available to the affected employee for review at a time and place designated by the Personnel Department or designated person.

Department heads shall make arrangements with the General Manager for review of their employee's personnel documents.

- 1.11 Change of Status Report. Every appointment, transfer, promotion, change of salary rate, or any other temporary or permanent change in status shall be reported to the Personnel Department or designated person in such manner as prescribed.

- 1.12 Right to Modify. Employment under these rules and regulations shall not constitute an employee contract. This document may be modified from time to time by the Board of Directors as they see fit.

SECTION 2.00 - DEFINITIONS

- 2.01 Appeal. A written statement by the affected employee that a dispute exists in the application of any of the rules contained herein.
- 2.02 Appointment. The offer to and acceptance by a person of a position with the District in accordance with the provisions of these rules.
- 2.03 At-Will Employee. Every District probationary or regular employee serves at the will of the District. Either the District or the employee may terminate the employment relationship at any time with or without cause.
- 2.04 Authorized Position. A specific work position, within a job title, that has been approved by the Board of Directors which is or may be held by an employee.
- 2.05 Board. The Board of Directors of the Rancho Murieta Community Services District.
- 2.06 Class. All positions having sufficiently similar duties and responsibilities to permit grouping under a common title and to permit the application with equity of common standards of selection, assignment and compensation.
- 2.07 Continuous Employment. District employment which is uninterrupted except by authorized absences.
- 2.08 Day. Shall be a calendar day unless otherwise identified.
- 2.09 Demotion. A disciplinary change in job title to a lower salary or salary range which is involuntary.
- 2.10 Department. A major administrative branch of the District, involving a general line of work, with one or more employees under the charge of one or more individuals, known as supervisors.
- 2.11 Disciplinary Action. The discharge, demotion, reduction in pay, or suspension of a regular employee for punitive reasons.
- 2.12 Dismissal. Involuntary termination of employment with the District.
- 2.13 District. Rancho Murieta Community Services District.
- 2.14 Employee. A person who is legally occupying a position in the District service or who is on an authorized leave of absence from such position.
- 2.15 Examination: Any combination of relevant and valid tests of fitness to determine the relative qualifications of competitors for appointment to a position in a class.

Open Competitive Examination. An examination for a particular class which is open to all persons meeting the desirable qualification for the class.

Promotional Examination. An examination for a particular class which is open only to employees with regular status and who meet the desirable qualifications for the class.

- 2.16 Exempt Employee. A person who is employed in a District position that meets the Fair Labor Standard Act ("FLSA") and California requirements of exemption from overtime and certain other protections of the Industrial Welfare Commission Orders.
- 2.17 Full-Time Employee. An at-will employee of the District who is regularly assigned to work forty (40) hours per week in an authorized position and has successfully completed the probationary period.
- 2.18 Good Standing. Any currently employed Full or Part-Time employee not under disciplinary action by the District.
- 2.19 Grievance. Any good faith or reasonable complaint of one or more employees or a dispute between the District and one or more employees involving the terms or conditions of his or her employment.
- 2.20 Immediate Family. An employee's father, mother, step parents, spouse, domestic partner, child, step child, foster child, brother, sister, grandparents, grandchild, or those of the employee's spouse.
- 2.21 Independent Contractor. An independent business person (in business for themselves) who is hired to perform specific tasks. They are not eligible for unemployment, disability, or workers' compensation benefits. The independent contractor is responsible for his/her taxes and workers' compensation insurance.
- 2.22 Intermittent Employee. An employee who works part of a normal work day or a fraction thereof, but such work is done on call with or without a set pattern, or seasonally working less than 1000 hours in a calendar year and at irregular intervals or without a set pattern.
- 2.23 Job Title. Descriptive title of a certain type of job performed by a District employee. Inherent in each job title are certain duties, responsibilities and degrees of authority.
- 2.24 Layoff. The separation of employees from the Rancho Murieta Community Services District's active work force for reasons of lack of work, lack of funds, changing priorities, measures to enhance efficiency, or to accommodate organizational changes.
- 2.25 Leave of Absence. When authorized, an absence from duty for a specified period with the employee having the right to return to his or her position at the end of the period.
- 2.26 Part-Time Employee. An at-will employee of the District who is regularly scheduled to work fewer than forty (40) hours each week in an authorized position and has successfully completed the probationary period.
- 2.27 Performance Evaluation. A review and evaluation of an employee's performance and capabilities in his or her authorized position by his or her immediate supervisor.
- 2.28 Personnel Manual/Rules. This group of rules and procedures concerning District Employment.
- 2.29 Position. A group of assigned duties and responsibilities assigned or delegated by competent authority, requiring the Full or Part-Time employment of one person.

- 2.30 Probationary Employee. A newly hired employee working for a designated period of time. Such employees may be dismissed without prior notice and without cause and do not have rights described in the Disciplinary Action and Dismissal section of this Personnel Manual.
- 2.31 Promotion. The movement of an employee from one job class to another job class with a higher maximum salary.
- 2.32 Reduction in Pay. A temporary or permanent decrease in wage or salary.
- 2.33 Regular Employee. A Full-Time or Part-Time at-will District employee who has successfully completed his or her probationary period.
- 2.34 Reinstatement. The restoration, without examination, of a former regular employee to a job title in which the employee formerly served as a regular non-probationary employee.
- 2.35 Salary Advancement. Any salary increase within the limits of a salary range.
- 2.36 Salary Range. Categories which determine the minimum and maximum wage pay for each employment job title.
- 2.37 Salary Reduction. A salary decrease of one or more steps within the limits of a salary range.
- 2.38 Salary Step. A level of salary payable in each salary range.
- 2.39 Seniority. The length of service of a regular employee with the District.
- 2.40 Sick Leave. An excused paid absence from duty by an employee due to illness as described in Section 5.22
- 2.41 Supervisor. A person who has day-to-day direct responsibility over the work of a specific employee.
- 2.42 Suspension. A District-mandated temporary separation from employment.
- 2.43 Temporary Employee. An at-will employee hired to fill a position of limited duration or service (not to exceed 960 –hours per fiscal year for retired annuitants or 1000 hours per calendar year for all other Temporary Employees), or, a position with uncertain, long term funding. The employee may serve during a limited service period and then be terminated without regular employment status with the Rancho Murieta Community Services District. Temporary employees have no reasonable expectation that they will be called or re-employed by the District in the future. They receive no District paid benefits or leave.
- 2.44 Termination. The conclusion or cessation of employment with the District, whether initiated by the District or the employee.
- 2.45 Timebase. Timebase refers to the number of hours an employee works and to the regularity with which the employee works. Timebase does not refer to an employee's employment status, i.e. regular, probationary, temporary, etc.

Types of Timebase:

- (a) Full-Time. Employee works the normal number of working hours assigned to the class.
- (b) Part-Time. Employee works a fraction of the normal work day, normally follows a pre-determined pattern of working hours.
- (c) Temporary. Employee may work a normal work day or fraction thereof, but such work is done on-call with or without a set pattern, or seasonally working less than 960 hours per fiscal year for retired annuitants or 1000 hours per calendar year at irregular intervals and without a set pattern.

- 2.46 Time-Off. Authorized absence from job duties, either compensated or uncompensated.
- 2.47 Transfer. A change of an employee from one position to another position in the same class.
- 2.48 Unrepresented Employee. A person who is legally occupying a position in the District service or who is on an authorized leave of absence from such position that is not represented by a union or bargaining unit.
- 2.49 Vacancy. An unfilled authorized position in the District.

SECTION 3.00 - FILLING VACANCIES, JOB ANNOUNCEMENTS, APPLICATIONS AND QUALIFICATIONS

3.01 Vacancies. When a vacancy occurs in an authorized position, the General Manager (or Acting General Manager if the General Manager position is vacant) shall, whenever reasonable, fill the vacant position with an existing District employee who is both qualified for the position and willing to accept the employment change. However, the General Manager may in his/her sole discretion determine that it is in the District's best interest to leave the position vacant or to fill the vacancy with a person who is not a current District employee. This section shall not be construed to limit in any way the District's right to hire the most qualified persons at all levels available as District employees.

3.02 Announcements: The Personnel department shall publish announcements of vacancies which shall state the employment standards of the position and pertinent information. Employment standards shall be established by the Board and included in the job class.

Announcements shall be considered published when they are posted on the District bulletin board.

The Personnel department may additionally publish notices of vacancies as deemed appropriate for recruiting qualified applicants.

(a) Announcements shall briefly specify the title and pay range of a position; the nature of the work to be performed; essential qualifications necessary for successful job performance of the work; the dates, time, place, and manner of receiving applications and administering examinations; and other pertinent information. All announcements shall include a statement that the Rancho Murieta Community Services District is an Equal Opportunity Employer, as well as an Affirmative Action Employer.

3.03 Qualification of Applicants: No person shall be employed in or appointed to any position requiring Full-Time or Part-Time service unless he or she meets the minimum qualifications of the education and experience prescribed for that class. In extraordinary situations, the Board may waive a stated requirement for a supervisory applicant and the General Manager may waive a stated requirement for a non-supervisory applicant.

(a) Applicants must have met applicable minimum qualification requirements by 5:00 p.m. of the final filing date.

(b) In the event an applicant is found to possess qualifications extraordinary for the position the applicant is being hired for, the General Manager may authorize the employment of such applicant anywhere within the appropriate pay range. For the purposes of this section, "extraordinary" means that the applicant has education, experience, and/or skills superior to that commonly required and expected for the class. Details of this action will be forwarded to the Board at their next regularly scheduled meeting.

- 3.04 Forms Required. Application shall be made on forms prescribed by the General Manager. Application forms shall require information covering training, experience, and other pertinent information, and may include certificates of one or more examining physicians, and references. Fingerprints shall be required for all District personnel. All applications must be signed by the person applying under penalty of perjury.
- 3.05 Submitting Applications. Applications must be received by the District not later than 5:00 p.m. on the final filing date. Applicants are responsible for getting their applications to the District by this time.
- 3.06 Disqualification: The General Manager may disqualify an applicant for any of the following reasons:
- (a) Untimeliness of Application. Failure to submit the required application to the District not later than 5:00 p.m. on the final filing date. Applicants are responsible for getting their applications to the District by this time.
 - (b) Unqualified for Position. Failure to demonstrate that the requirements or qualifications established for the authorized position have been met.
 - (c) Conviction Record. Conviction of a felony or misdemeanor which was of such a nature as to have a clearly adverse effect on the applicant's ability to perform the duties of the position.
 - (d) False Statement. False statement of material fact; or actual or attempted deception, fraud, or misconduct on an application; or actual or attempted deception, fraud or misconduct during an interview or examination.
 - (e) Failure to complete process. Failure to complete the pre-hire process as required by the District.
- 3.07 Notice of Rejection. Whenever an application is rejected, written notice of such rejection shall be mailed to the applicant. Incomplete or deficient applications may be returned to the applicant for amendment. Unless otherwise approved by the General Manager, such amendments must be received by the District not less than forty-eight (48) hours prior to the scheduled interview or examination.
- 3.08 Medical Examination*:
- (a) All individuals who are offered full-time, temporary, or part-time employment shall be required to submit to a physician's examination. For public health and safety related positions, (i.e., Security Patrol, Equipment Mechanic, Plant Operators and Utility Workers) a controlled substance test at District expense will also be required. Such examination shall be performed by a licensed physician retained by the District. Documents indicating that the applicant has received a medical clearance shall be kept in a confidential file under the custody of the Personnel Department and shall not be a part of the personnel file.
 - (b) The General Manager may, upon advice and consultation with competent medical authority, establish job related physical standards for each job title. An applicant's failure to achieve the minimum standard so established will result in disqualification for appointment.

- (c) Nothing in this section shall serve to disqualify an applicant who has a disability and can be reasonably accommodated under provisions of the Americans with Disabilities Act.

** Refer to District Policy 2012-06, Pre-Employment Physical Examinations, for policy details*

3.09 Work Eligibility. A candidate for employment must be eligible under appropriate federal regulations to work in the United States. It is the policy of the District to hire only citizens of the United States or others authorized to work in the United States. Documentation of eligibility to work in the United States will be required as a condition of employment.

3.10 Driver's License*. A candidate for employment must possess and maintain a valid California motor vehicle driver's license at the required level, if driving is required in the duties of a position, or if driving is not required, a California Identification Card. Insurability and compliance with established District vehicle operation standards are a condition of employment.

** Refer to District Policy 2012-05, District Driving Policy, for policy details*

3.11 Method of Examination. The selection techniques used in the examination process shall be impartial and relate to those subjects which measure the relative capacities of the persons examined to execute the duties and responsibilities of the class to which they seek to be appointed. Only those applicants possessing the most relevant qualifications will be invited to continue the application process.

3.12 Screening Panel. A credentials screening panel may be assembled by the General Manager to evaluate the comparative qualifications of the applicants, when it is desirable or necessary to limit the number of candidates to be interviewed for a given position. To allow full consideration of the relevance, level, recency, progression and quality of candidates' education and experience, the applicant may be required to submit written statements, certifications, and/or transcripts of college credits in addition to the standard application form.

Should there not be sufficient qualified candidates to screen, the General Manager may extend the final filing date of the job in question for the length of time he or she finds necessary to recruit a reasonable number of qualified applicants.

3.13 Examination Scheduling. Examinations will be scheduled as the need requires, and may be postponed, canceled, or extended by the General Manager by notifying all persons who have filed applications and/or by posting a notice on the bulletin board.

3.14 Conduct of Examination: The General Manager shall determine the manner and methods by which examinations shall be given. The General Manager may recommend a contract with any competent agency or individual for the preparation or scoring of examinations. The General Manager shall arrange for the use of facilities, equipment, and related matter for the conduct of examinations.

(a) The General Manager may disqualify:

- (1) Any candidate who attempts to interfere with the fair, equitable and orderly conduct of an examination process.
- (2) Any candidate who is tardy for the examination.

- (3) Any candidate who fails to appear for an examination.
- (4) Any candidate who has not certified in writing that he or she possesses the minimum qualifications for the position.
- (5) Any candidate whose application was either not received or postmarked on or before the filing date.

- (b) Oral Interview Panel. The General Manager may assemble an Oral Interview Panel to conduct oral interviews and advise the General Manager and the Board regarding the selection of a qualified candidate to fill an authorized position.
- (c) Notification. Each candidate taking an examination shall be given written notice regarding the District's determination.

3.15 Power of Appointment. The positions of General Manager, ~~Assistant General Manager, Finance Officer, District Secretary, and District Engineer,~~ shall be filled by Board appointment. The General Manager shall appoint successful candidates to fill all other vacant positions.

3.16 Probationary Period:

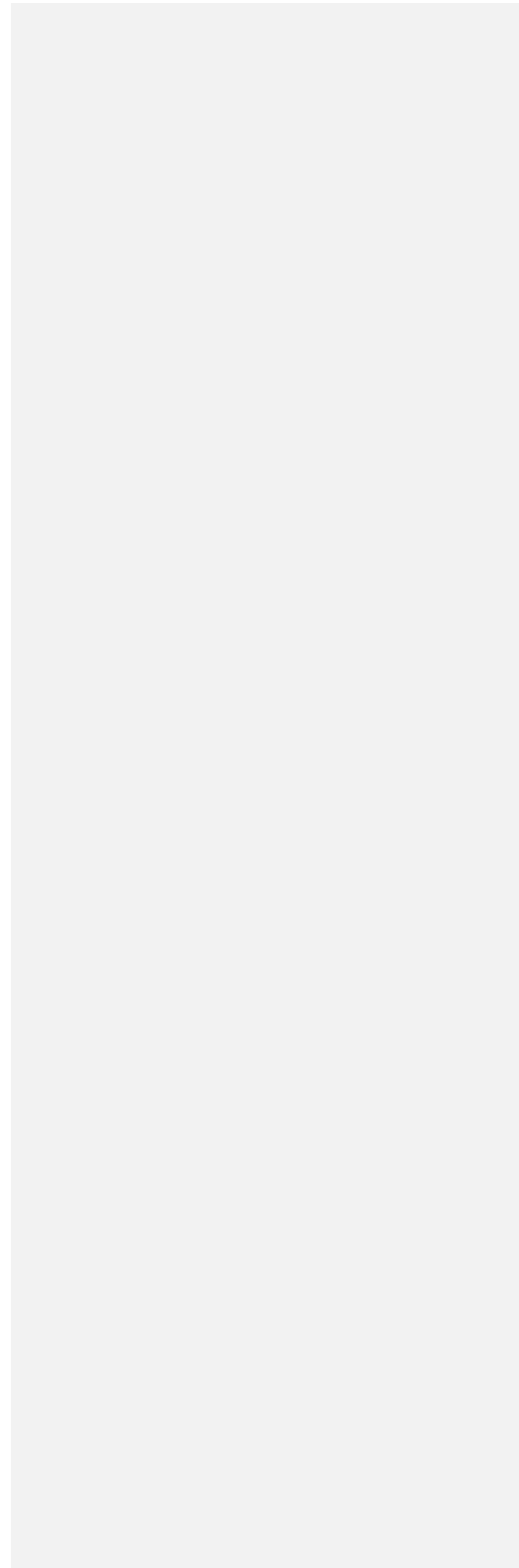
- (a) Before employing a person as a Full-Time or Part-Time regular at-will employee, the District shall employ that person as a Probationary Employee for a period of at least twelve (12) months. The General Manager may extend the probation period beyond twelve (12) months. Any extension of the probationary period shall also extend the probationary status of the employee as defined in Section 3.16(b) and (c) below.
- (b) The probationary period is a step in the District's hiring process. It allows the Probationary Employee and the District an opportunity to determine if this is the right job for this person and the right person for the job. This is a learning and adjustment period for the employee. The District will use the probationary period to continue its assessment of an applicant for regular at-will employment.
- (c) At any time during the probationary period, the Probationary Employee or the District may terminate the employment relationship without cause and without any right of appeal.
- (d) During the probationary period, the Probationary Employee may be terminated at any time without prior notice.

3.17 Background Security Check.

~~Within ten (10) days of the employment orientation~~ After a tentative employment offer, the fingerprint Live Scan process shall be completed at a Live Scan facility and forwarded to the Bureau of Criminal Identification Investigations, State Department of Justice, for processing on each prospective employee who has passed his/her interview.

No person shall be employed by the District who has been convicted of a serious or violent felony. Serious or violent felony as used in this paragraph means a serious

felony as listed in Penal Code Section 1192.7(c). Violent felony as used in this paragraph means a violent felony as listed in Penal Code Section 667.5.



SECTION 4.00 - TEMPORARY EMPLOYEES

- 4.01 Hiring of Temporary Employees. Temporary Employees, as defined in Section 2.43, may be hired from time to time as needed. The General Manager shall determine the terms and conditions of each Temporary Employee's employment. These terms and conditions will be decided for each individual prior to actual employment, but shall not exceed 1,000 hours or 180 days for each separate temporary employment. A Temporary Employee may serve on an on-call, as-needed basis, or may be hired for a specific project or period of time.
- 4.02 Salary of Temporary Employees. The General Manager, subject to approval or ratification of the Board, shall determine the rates and amount of pay for each Temporary Employee. The factors taken into consideration will include the type of work to be performed and the anticipated duration of employment. The rate of compensation may be by piece work, by the hour, by the day, by the week or by the month, as determined to be most feasible, reasonable, and equitable in each case.
- 4.03 Termination of Temporary Employees. A Temporary Employee serves at the will or pleasure of the District Board and may be terminated at any time without cause or prior notice. A Temporary Employee does not have the rights described in the Disciplinary Action & Dismissal section of this Personnel Manual.

SECTION 5.00 - EMPLOYMENT HOURS, LEAVE, VACATION AND HOLIDAYS

5.01 Hours of Work:

- (a) Workweek (General Criteria). The normal hours of work for District employees shall consist of eight (8) hours per day, five (5) days per week. Specific work schedules may be established to comply with legal requirements or to meet agency business and public service needs, to include any of the following: 5/40, 4/10 or 9/80 workweek as directed by the Board of Directors.
- (b) Standard Workweek. The normal workweek is defined as forty (40) hours within seven (7) consecutive 24-hour periods. The District defines the start of the workweek on Sundays, and five (5) days. Any program providing for employee work weeks of less than five (5) daysforty (40) hours within seven (7) consecutive 24-hour periods, shall be subject to Board approval. The hours of operation shall be recommended by Department Heads to accommodate the type of work required, and approved by the General Manager.
- (c) Rest Periods. When practical employees shall be allowed a rest period of ten (10) minutes during each four (4) consecutive hours of work. Such rest periods shall be scheduled in accordance with department head or supervisor requirements. Except as indicated below, an unpaid meal period of at least thirty (30) minutes may also be provided as designated by the District to occur approximately in the middle of a work shift of at least eight (8) hours.

In certain positions, District management may require or permit employees to incorporate a paid (working) meal period within the normal work shift.
- (d) Rest Period Conditions. The District may designate areas where rest periods may be taken. An employee may occasionally be required to perform duties, if necessary, during his/her normally scheduled rest period.

5.02 Attendance. Employees shall be in attendance at their work in accordance with the rules regarding hours of work, holidays, and leaves. The General Manager shall enforce attendance requirements and maintain attendance records of employees. Any absence from work, taken upon the initiative of an employee, without prior authorization or as provided for in these rules, shall be the basis for disciplinary action, if such absence is found to be unwarranted or regarded as detrimental to the District.

5.03 Overtime:

- (a) Policy. The general policy of the District will be to discourage the use of overtime. Overtime must be authorized in advance by the General Manager, or an employee's supervisor. Overtime shall be authorized only in those instances where it is essential to the continued operation of the District.
- (b) Definition. Work authorized in excess of normal working hours except as provided for in stand-by and call-back time, shall be classified as overtime when an employee's total work time exceeds forty (40) hours

during the specified District work week. Overtime shall be compensated at the rate of 1-1/2 hours of compensation for each overtime hour worked.

- (c) Computation Base. Work schedules may provide for work—days exceeding ~~eight (8)~~ nine (9) hours. Any employee who is required to work more than forty (40) hours in a work week shall receive overtime pay. Work time does not include paid leave time such as vacation, sick leave, bereavement leave, etc.
- (d) District Work Week. The District work week begins at 12:00 midnight on ~~Saturday~~ Sunday morning and ends at 12:00 midnight on ~~Friday~~ Saturday night each week.
- (e) Holiday Overtime. Employees required to work on an observed holiday shall receive up to eight (8) hours holiday pay plus time and one-half for any hours worked on that holiday.
- (f) Overtime Exclusions. Employees designated as managers, department heads, or other exempt classes shall be exempt from overtime compensation of any kind.
- (g) Hours Not Counted Toward Overtime Computation. Sick leave, vacation, bereavement leave, jury duty, and personal holiday time are not considered to be hours worked for purposes of computation of overtime pay.

5.04 Shift Differential/Split Shift for District Employees. Upon prior approval of the Board of Directors, all District employees working the graveyard shift during the hours of 12:00 a.m. (midnight) until 6:00 a.m. or working a split shift shall receive a shift differential or split shift amount as determined by the Board of Directors. This shift differential shall be paid along with the regular payroll cycle.

5.05 Standby Duty. In order to maintain a high standard of emergency services to the Community, Field Operation personnel are required to be available for on-call duty. All Field Operation personnel (who have completed their probationary periods) may be required to participate. Employees on standby status must be ready to respond immediately to calls for service; to be reachable by radio-controlled pager, radio, or telephone; and to refrain from activities which might impair the employee's ability to perform assigned duties. Employees assigned to Standby Duty will be paid a fixed daily rate, as determined by the District, for Standby ~~P~~ay. An employee on Standby Duty will be compensated according to Section 5.05 for each instance of call-back duty.

5.06 Call-Back. The nature of District services and the consequences involved in potential damage to property and buildings may make it necessary to call-back a District employee or employees, outside of the employee's normally assigned work-shift, to make emergency repairs or deal with an emergency situation. An employee called-back in such a situation shall receive a minimum of two (2) hours pay at 1-1/2 times his/her normal hourly pay rate and mileage reimbursement for round trip at the current approved District mileage rate. Call-back pay and mileage reimbursement shall not apply to exempt employees.

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5.07 Jury Duty and Court Appearances. This section shall not apply to any employee who is named party to action unrelated to the District and its activities or suits against the District. In such cases, employees may request vacation or personal leave.

When an employee is required to serve on jury duty or is subpoenaed as a witness to appear before a court, administrative agency, public body or commission, the employee must promptly notify his or her supervisor. Employees who are Sacramento County residents or residents of other counties with "phone-in" juror programs are requested to first ask the court to put them on "phone-in juror status". Employees required to serve as jurors for less than a full day are expected to spend the balance of the day at their regular District positions when the time remaining for their work shift exceeds three (3) hours.

- (a) Employees who receive a daily stipend from the court for serving on a jury shall submit their stipend pay, for each day they also receive District Jury Duty pay, to the District. Employees are entitled to keep all mileage reimbursement received, if any.
- (b) If there is an emergency situation or if the District has special need for the employee's services, the General Manager will ask the court to excuse the employee from jury duty.

5.08 Special Leaves:

(a) Special Leave. On rare occasions, due to special circumstances, the District may find it necessary to place an employee on a special leave status, with or without pay, as warranted by the special circumstances. The District may authorize this unusual leave, with or without pay, and maintain an employee's usual employment status during a stipulated time period.

(b) Authorized Leave of Absence:

- (i) A regular Full-Time or regular Part-Time employee who has completed his or her probationary period may be allowed up to thirty (30) days leave of absence per calendar year without pay for acceptable reasons upon the prior written approval of the General Manager.
- (ii) A leave of absence over thirty (30) days requires the prior approval of the Board.
- (iii) The District will continue to pay health and other benefits for an employee while the employee is on an authorized, unpaid leave of absence for up to 90 days during any twelve (12) month period. The District will cease to pay health and other benefits for an employee who is on an authorized, unpaid leave of absence for more than 90 days for the remaining duration of the leave of absence.

An employee's salary advancement date shall be delayed accordingly, unless a special exception has been expressly approved in writing by the General Manager.

- (c) Bereavement Leave. Up to three (3) working days of leave with pay may be granted because of death in an employee's Immediate Family, as defined in Section 2.20, ~~and spouses of the Immediate Family.~~

- (d) Disability Leave. Any employee incurring a non-work time injury or disability outside District employment shall be entitled to disability leave as provided herein. A maximum of thirty (30) days may be granted by the General Manager upon proper medical certification that the employee is disabled to the extent that work performance is not possible.

Only the Board may approve a request for disability leave for over thirty (30) days. An employee is entitled to elect usage of accumulated sick leave and/or vacation time during disability leave.

Following exhaustion of accumulated vacation and sick leave balances, the disability leave will be on an unpaid basis. An employee may also choose that the entire disability leave be on unpaid status without reducing accumulated vacation or sick leave balances.

Medical certification must be submitted at the initiation of disability leave and monthly thereafter. The certification must state the nature of the disability and the estimated return to work date. Sick leave, rather than special disability designation, will apply to leave periods of five (5) calendar days or less.

An employee shall not earn additional vacation, sick leave, or other benefits except medical insurance during disability leave for a period of up to six (6) months maximum. Also, an employee's salary advancement date shall be adjusted during disability leave, thereby delaying eligibility for a salary increase/step increase within a salary range.

- (e) Preferential Re-hire. With the approval of the General Manager, a former regular employee may be granted preferential rehire status. These are employees who have been placed on an extended leave of absence due to injury on or off the job where the District has found it necessary to replace the employee with another employee in order to meet critical workload. Employees granted preferential re-hire status may, at the District's discretion, be reinstated to the same or a comparable position when a vacancy occurs.
- (f) Leave Without Pay. Leave without pay may be granted to an employee by the General Manager whenever the General Manager considers such leave to be in the best interest of the District.

An employee on leave without pay status for five (5) days or more during a pay period shall not earn vacation, sick leave, insurance, or other benefits for that pay period, and the employee's salary advancement date shall be delayed accordingly, unless a special exception has been expressly approved in writing by the General Manager.

Failure of an employee on leave without pay to report to work promptly at the leave's expiration or within reasonable time after notice to return to duty shall be cause for discipline.

(g) Military Leave. Military Leave shall be granted in accordance with Section 395 of the California Military and Veterans Code and Federal Military Leave regulations. An employee entitled to military leave shall give the General Manager an opportunity within the limits of military regulations to determine when such leave shall be taken.

(h) Pregnancy Leave. An employee may be granted a prolonged time off without terminating employment for pregnancy and maternity. Such leave shall be governed by the same standards applicable to any other leave for non-job related medical or disability reasons. Such leave will normally be without pay, except as provided below, and it will be granted with the expectation that the employee will return to work at a stipulated time.

An employee may elect to exhaust their accumulated sick and vacation time during pregnancy leave. While an employee is on unpaid pregnancy leave status no additional leave or service credits, with the exception of health benefits, will be granted. Pregnancy leave allows an employee to return to her former position or a comparable position.

(i) Work-Related Injuries and Work-Related Injury or Illness Leave of Absence. Any work related injury or illness regardless of how minor must be immediately reported to the employee's supervisor or other available supervisory personnel.

An employee who requires a work-related injury or illness leave of absence ("leave") must notify the General Manager in writing of the need for such a leave as soon as the employee learns that they are or will become temporarily disabled and unable to work due to a work-related injury or illness. The notice must specify the reason for the leave, the date such leave will begin, and the expected duration of the disability. An employee who requests such a leave may be required to provide an initial proof of disability and from time to time a continued proof of disability in the form of a physician's statement and/or be examined by a District selected physician.

The leave shall be granted for the duration of the work-related disability or to the extent provided by law. Accrued vacation and sick leave may be used to supplement any worker's compensation benefits for the initial days not covered by Workers Compensation or other disability insurance benefits received by the employee during the leave. An employee may elect not to use accumulated leave time. In no case shall the employee's compensation while on leave exceed their regular earnings. An employee shall continue to earn benefits while on leave for up to one (1) year.

An employee who is on a leave for a period in excess of three (3) months must notify the District by the end of each month thereafter both of the status of the disability and their continued intent to return to work with the District once they recover from the disability. An employee returning from a leave shall be required to provide a physician's statement which indicates that they are fit to return to work and/or be examined by a District selected physician.

A request for an extension of a leave will be considered if it is received by the General Manager in writing prior to the expiration of the approved leave and is supported by proof of continued disability in the form of a physician's statement. The District may require an employee to be examined by a District selected physician before acting upon a leave extension request.

An employee who fails to report for work at the end of a leave will be considered to have voluntarily resigned. The District will retain an employee on leave until one of the following situations occurs:

- 1) The employee is released for full duty.
- 2) The District receives medical evidence satisfactory to it that the employee will be permanently unable to return to work.
- 3) The employee directly or indirectly informs the District i.e., by resignation, accepting other employment, moving out of the state, etc., that they do not intend to return to the District's employ.

An employee who returns to work at the end of their leave will be returned to their former position, if possible, or will be offered the first available opening in a comparable position for which the employee is qualified. The employee must provide the District a physician's statement indicating that they are fit to return to work and/or be released to return to work by a District selected physician.

- (j) Administrative Leave. Administrative leave compensates specified exempt employees for hours worked in excess of the normal work week of forty (40) hours per week, that are ineligible for standby pay and/or overtime.

On January-July 1st of each fiscal year, the following classifications exempt employees shall be granted five (5) days 80 hours of administrative leave.

- Director of Administration
- Director of Operations
- Security Supervisor
- Accounting Manager
- District Secretary

Employees beginning District employment after January-July 1st shall receive a pro rata amount of administrative leave, computed on a 26 pay period basis.

Administrative leave may be used for whatever reason and shall be taken as scheduled with the General Manager's approval. Administrative leave shall not be accumulated from one year to the next, with a maximum of 40 hours carried over. Any administrative

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leave beyond the allowable 40 hours remaining to the exempt employee's credit at the end of the year shall be lost without compensation.

~~Any administrative leave remaining to the exempt employee's credit at the end of the year shall be lost without compensation.~~ Upon separation from the District, any administrative leave remaining shall be ~~lost without compensation~~ paid to the employee.

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5.09 Unauthorized Absence:

- (a) Any employee, who is absent for three (3) calendar days without being on authorized sick leave, authorized vacation leave, authorized bereavement leave or authorized leave of absence shall automatically have resigned his or her employment with the District. An unauthorized absence during part of a day constitutes an unauthorized absence for an entire day.
- (b) Nothing in this section shall limit the General Manager's authority to discipline or dismiss an employee due to an unauthorized absence.
- (c) An employee terminating employment in the manner described in this section will be considered to have voluntarily resigned his or her District employment.

5.10 Paid Holidays for Full-Time or Part-Time Employees:

- (a) New Year's Day (January 1)
- (b) President's Day (3rd Monday in February)
- (c) Memorial Day (last Monday in May)
- (d) Fourth of July
- (e) Labor Day (1st Monday in September)
- (f) Thanksgiving Day (4th Thursday in November)
- (g) Day after Thanksgiving
- (h) Christmas Day (December 25)

In addition to the designated holidays listed above, other days or portions of days may be authorized by official proclamation of the President of the Board of Directors. The President may take such action to coincide with holidays declared by the President of the United States, the Governor of the State of California, or when in the opinion of the President a significantly important local event merits such action.

For employees regularly assigned to a five-day, Monday through Friday work schedule, recognized holidays which fall on a Saturday will be observed on a Friday, those falling on a Sunday will be observed on a Monday. For all other employees, holidays will be observed on the actual declared holiday. In the event there is any work performed on any of the above-mentioned holidays, the employee shall receive ~~up to eight (8) hours~~ a full day (dependent upon work schedule hours) holiday pay plus time and one-half for any hours worked on that holiday

- 5.11 Personal Holiday. A regular Full Time employee who has completed his or her twelve (12) month probationary period may take four (4) "personal holidays" with pay per year. The employee must give his or her supervisor at least two (2) weeks advance notice and receive authorization before taking the personal holiday.

A regular Part-Time employee who has completed his or her twelve (12) month probationary period shall accrue personal holiday hours with pay in the same proportion

as his or her working hours bear to the normal working hours of a Full-Time employee in a comparable position.

5.12 Vacations:

Probationary Employees. A new employee with Rancho Murieta Community Services District, filling a position which is eligible for regular Full-Time appointment, shall begin the accrual of both sick leave and vacation time credits upon hire date.

Accrual Rate.

All employees who are employed on a continuous Full-Time basis shall accrue annual leave credits for each regular hour paid on the basis of the schedule below:

<u>Years of Continuous Service</u>	<u>Hours Accrued per Hour Paid</u>	<u>Max Hours of Accrual/Year</u>
Year 1 through 24	.038460463	80.96
Year 3 through 4	.0616	128
Year 5 through 10	.05770731	120.152
Year 11 through 14	.06150847	128.176
Year 12	.0654	136
Year 13	.0692	144
Year 14	.0731	152
Year 15±	.0962769	160.200
Year 16	.0808	168
Year 17	.0846	176
Year 18	.0885	184
Year 19	.0923	192
Year 20	.0962	200

5.13 Pro-rated Accruals. Part-Time employees shall earn service and vacation credits at a ratio of their hours worked to Full-Time employment. In other words, the earning rates for a 20-hour per week employee shall be at 50%, a 30-hour per week employee shall be at 75%, a 32-hour per week employee shall be at 80%, etc. No vacation, sick leave or other paid benefits are provided for temporary employees.

5.14 Usage Waiting Period. No vacation leave may be granted until an employee has completed at least six (6) months of continuous service with the District. At no time may an employee take vacation leave in excess of their accumulated balance.

5.15 Accumulation of Vacation Time:

(a) An employee may accumulate up to two (2) years of vacation accrual of vacation leave. If an employee's vacation balance exceeds this amount, they shall cease to earn vacation credits until their balance is less than the maximum accrual amount.

For example, if you accrue ten (10) vacation days per year (6 2/3 hours of vacation per month), you may accrue a maximum of twenty (20) unused days of vacation. You will not be eligible to accrue more until some of the twenty (20) days are used. At no time may you "save" any more than your twenty (20) day maximum.

(b) All employees are encouraged to take at least five (5) consecutive days of vacation leave each year.

- (c) Upon approval of the General Manager an employee may receive pay for his/her earned vacation instead of taking time off, after the initial six (6) month probationary period, provided that the employee has taken at least five (5) consecutive days of vacation, administration leave and/or personal holiday time off during that year. In addition, the employee must have at least (forty) 40 hours of accrued vacation time remaining after the buy back. The vacation buy-back will be an annual event in early December coinciding with a regular pay cycle.
- 5.16 Accrued Vacation Time. Vacation time earned, to a maximum of two (2) years vacation allotment but not used by an employee at the date of adoption of this manual shall continue as a credit for vacation time.
- 5.17 Authority to Grant Time-Off. The times at which an employee may take vacation shall be at the discretion of his/her immediate supervisor and department manager. Requests will be granted with due regard for the wishes of an employee and particular regard for the need of the District to conduct business and provide services. The General Manager has the authority to ultimately deny a request for vacation leave if he/she deems it in the best interest of the District.
- 5.18 Holiday Adjustments. Holidays falling within an employee's authorized leave period shall not be charged as vacation time.
- 5.19 Double Compensation Prohibition. Double compensation for any day(s) worked or leave claimed is prohibited. For example, an employee shall not claim regular hours, vacation leave or sick leave for the same day(s) in a pay period.
- 5.20 Disposition of Vacation Time Upon Termination. Upon separation from employment, regular and probationary employees will be paid for their accrued vacation time. If an employee has used more vacation time than he or she has accrued, the District and the employee agree that the excess will be deducted from the employee's final check.
- 5.21 Scheduling of Vacation:
- (a) No employee has a right to take his or her vacation at a particular time. Supervisors and department managers may only grant vacation requests if District operations will not be adversely affected.
- (b) ~~Each January the General Manager or his/her designee shall post a vacation schedule. Employees shall fill in their vacation request by February 1 of each year.~~
- (c) Should a conflict arise in the scheduling of vacations, the conflict will be resolved in favor of the employee with the greater seniority within his or her current job title. However, seniority may be exercised only once by each employee in each successive choice of vacation periods.
- (d) Requests for vacation which are made after the posted period, will be granted only where vacancies exist or staffing requirements permit and only with approval of the employee's supervisor and department manager.

- (e) Employee requests for modification of the vacation schedule will usually be granted if submitted 2 weeks in advance and the request may be accommodated. Supervisor and department manager approval is required for any modifications.

5.22 Sick Leave Policy. Sick leave with pay is an insurance or protection granted in circumstances of adversity and to promote the health of the individual employee. It is not an earned right to time off from work except as specified in this policy and is not to be confused with vacation or other types of leave. It is a request for entitlement to a benefit to be exercised under appropriate circumstances. When used judiciously, sick leave benefit accruals provide the employee a cushion in the event the employee encounters a major or catastrophic illness or injury.

Paid sick leave will be granted by the District when an employee must be absent because of (1) the employee's illness, medical or dental examination, injury, disability or exposure to contagious disease which incapacitates the employee from performing his or her duty or (2) the employee's attendance with a member of the employee's Immediate Family because of illness, injury, death (over that allowed for bereavement leave), or exposure to contagious disease and where the attendance of the employee is definitely required.

5.23 Accrual of Paid Sick Leave for Full and Part-Time Employees:

- (a) All employees who are employed on a continuous full-time or part-time basis shall accrue sick leave credits on the basis of up to 3.69 hours (.04615 per hour paid) per pay period to a maximum of 96 hours per year. Sick leave may accrue without limitation.
- (b) Part-Time employees shall earn sick leave credits at a ratio of one hour earned per every 30 hours worked. ~~their hours worked to Full-Time employment. In other words, the earning rates for a 20-hour per week employee shall be at 50%, a 32-hour per week employee shall be at 80%, etc.~~
- (c) All accrued sick leave may be used in the event of a catastrophic illness or injury.

5.24 Unused Sick Leave. No employee shall be compensated directly for accrued but unused sick leave upon termination of employment; however, accrued sick leave may be converted to time worked for the purposes of retirement under the District's contract with PERS.

5.25 Use of Sick Leave. Sick Leave must be accrued before taken or used.

5.26 Election Concerning Sick Leave. Refer to Section 5.08 (d) regarding election of sick leave during a disability leave and Section 5.08 (i) regarding election of sick leave during a worker's compensation leave.

5.27 Evidence of Illness. The General Manager may require any employee who is absent due to illness or injury to be examined by the District's doctor.

At the General Manager's discretion, satisfactory evidence of illness or injury for any period of absence due to illness or injury may be required prior to the employee's return to duty.

The General Manager shall have the discretion to require the employee to present a personal treating physician's certificate upon his or her return to duty stating that the employee has fully recuperated from the illness and/or injury and has no physical or mental limitations preventing the employee from performing his or her required job responsibilities. Until such a certificate is presented, the General Manager shall have the right to disallow the employee's return to work. In such cases, the employee shall continue to use accrued sick leave, if any, or shall be on authorized leave of absence without pay.

- 5.28 Unearned Sick Leave. Sick leave with pay shall not be allowed or taken until accrued. Sick leave will not be advanced.
- 5.29 Extended Sick Leave Without Pay. Any request for extended sick leave without pay due to illness or injury shall be at the discretion and approval of the General Manager. At the time of the request, the Full-Time or Part-Time employee shall submit a physician's certificate to support the request. The General Manager may approve a request for sick leave without pay for a period of up to thirty (30) days. Only the Board may approve a request for sick leave without pay for over thirty (30) days. In the event the extended sick leave qualifies as FMLA or CFRA leave, the provisions of those acts will take precedence and this Section will apply after the expiration of the leave times provided by those acts.
- 5.30 Non-Payment Upon Termination. Upon termination for any reason from District employment, an employee is not entitled to receive payment for accrued but unused sick leave.
- 5.31 Sick Leave Abuse. Violation and/or abuse of sick leave privileges will result in disciplinary action. Employees with a pattern of frequent absences for short durations and without reasonable basis may be subject to appropriate disciplinary action. Examples of potential sick leave abuse would be frequent absences following or preceding holidays, reoccurring absences on Fridays and Mondays, etc.
- 5.32 Catastrophic Illness Time Donation: Employees may donate accrued sick leave time for credit to another District employee who suffers a catastrophic illness or injury as determined by the General Manager.

**** Refer to District Policy 2011-03, Catastrophic Illness Time Donation, for policy details.***

SECTION 6.00 - TEMPORARY ASSIGNMENTS

- 6.01 Assignment to Temporary Work. The General Manager may temporarily assign an employee to perform work normally performed by an employee at a different level of salary.
- 6.02 Temporary Salary:
 - (a) An employee temporarily assigned to perform work of a lower-paid employee shall not have his or her salary reduced.
 - (b) An employee temporarily assigned to perform all duties of a higher-paid position shall, for the period of temporary assignment, which shall be no less than 3 consecutive days, have his/her hourly wage increased by five (5) percent.

SECTION 7.00 - EMPLOYEE ORGANIZATION, ADVANCEMENT AND COMPENSATION

- 7.01 Personnel Organization. The District is organized into several departments. Each department includes one or more job titles. Each job title has one or more authorized positions.
- 7.02 Salary Ranges. The District has adopted certain salary ranges for District employees. These ranges may be changed from time to time by District action.
- 7.03 Probationary Period:
- (a) When the General Manager appoints an existing District employee to fill a vacant position, that appointment shall be for a probationary period not to exceed ~~six (6)~~twelve (12) months from the date of the appointment, unless otherwise required by a provision in a Memorandum of Understanding or contract. If the employee fulfills the duties of that position to the District's reasonable satisfaction and otherwise successfully completes the probationary period, the employee shall then become a regular employee in the new position.
 - (b) If during the ~~six (6)~~twelve (12) month probationary period, the employee, appointed to a new position pursuant to Section 7.03 (a), does not perform to the District's reasonable satisfaction or otherwise does not successfully complete the probationary period, that employee shall resume his/her duties in the prior position which he/she held. The General Manager shall then take steps necessary to fill the vacant position.
 - (c) When an employee is working in a new position on a probationary basis pursuant to Section 7.03(a), the General Manager may appoint another District employee ("the other employee") to fill the first employee's position. The other employee shall also serve a probationary period in his/her new position. The other employee shall become a regular employee in the new position contingent upon successful completion of the probationary period and contingent upon the first employee, as referenced in Section 7.03(a), successfully completing his/her probationary period.
- 7.04 Annual Salary Review. Each year the General Manager will review the salary ranges paid by the District and make recommendations to the Board for any necessary changes.
- 7.05 Salary Organization. There shall be a salary range for each authorized position.
- 7.06 Performance Evaluations.
- (a) An employee's supervisor will prepare, in writing, a performance evaluation for each employee.

- (b) Performance evaluations will be prepared in the following instances:
- (1) When an employee has worked an initial ~~six (6)~~twelve (12) month period in his or her new job position (this applies not only to newly hired employees, but also to employees who have been promoted or otherwise transferred to new job classifications);
 - (2) Annually, for unrepresented employees on the focal review date in April; salary adjustments, if applicable, to be effective May 1st. For represented employees annually on the anniversary of their service date.
 - (3) When an employee is being considered for promotion, transfer, demotion, termination, or other disciplinary action is being considered;
 - (4) Whenever the employee's supervisor believes there has been a significant change in the employee's performance; and
 - (5) Whenever requested by the General Manager or the Board of Directors.
- (c) All performance evaluations become a permanent part of the employee's records. Only the employee involved, the employee's supervisor, the General Manager or his/her designee and the Board may have access to an employee's performance evaluations.
- (d) Upon completion of the performance evaluation, a meeting shall be held between the employee and the supervisor to discuss the employee's performance and to assist in developing the employee's maximum potential within District service.

**** Refer to District Pay for Performance Manual for complete details.***

7.07 Insurance

- (a) Group medical insurance is currently available to all regular Full-Time employees and their eligible spouse, domestic partner and dependents. An employee becomes eligible on the first day of the second calendar month following his or her appointment as a probationary employee.
- (b) Benefits currently provided include group medical, vision, dental and life insurance. Currently, the District will pay an amount established from time to time by the Board.
- (c) The Board may delete or change insurance benefits for employees and/or dependents with or without amending this manual.
- (d) Regular Part-Time and Temporary Employees, and independent contractors shall not receive, nor be entitled to, District-paid health insurance benefits.

- (e) Cafeteria Plan – whereby the employee has the option of opting out of District provided medical benefits for cash, provided that the employee can show proof that they would have dual coverage. The opt-out benefit amount is \$350.00 per month.

7.08 Worker's Compensation. Worker's compensation is provided for all employees.

7.09 Unemployment Insurance. Unemployment insurance is provided in accordance with current state and federal laws.

7.10 Retirement Program:

- (a) The District currently maintains membership in the Public Employees' Retirement System (PERS) for employees qualifying to be covered by this retirement plan. The contributions are specified in the District's contract with PERS or as subsequently amended.

- (b) For employees not qualifying for memberships in the PERS retirement plan, it is mandatory that these employees participate in a retirement plan, such as a Deferred Compensation Plan, in which the employee makes the contributions. This plan is administered in accordance with the agreement between the District and the plan administrator. Information on the administration and requirements of the plan are available from the personnel administrator.

- (c) The Board may delete or change retirement benefits with or without amending this manual.

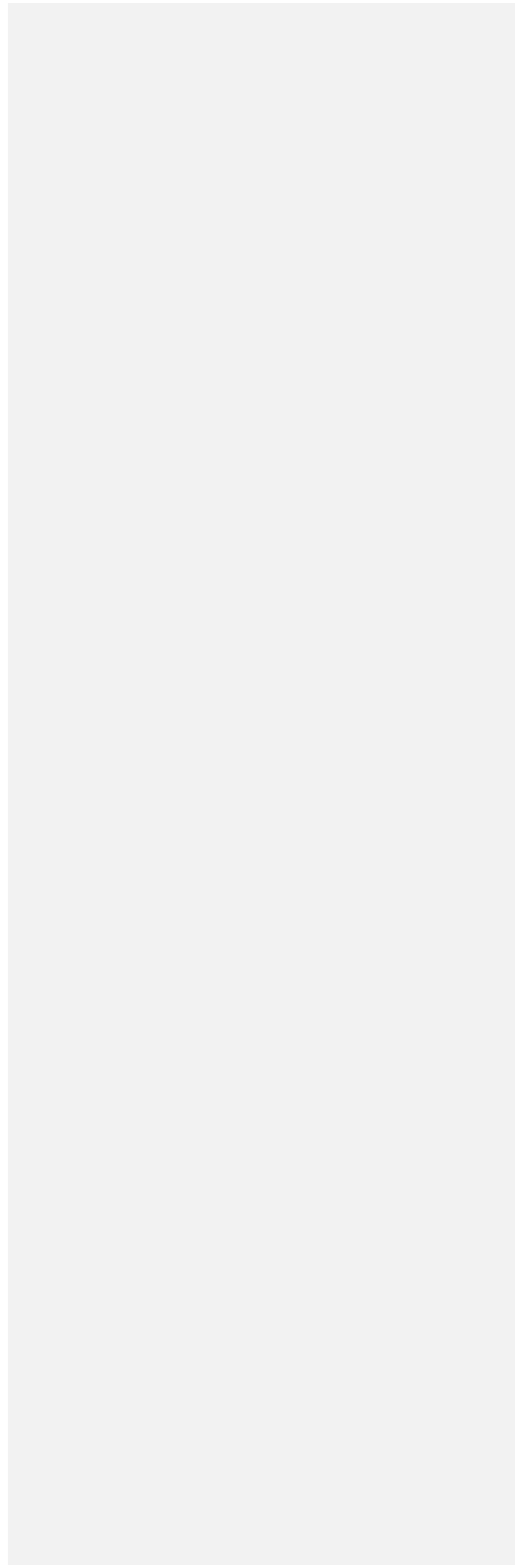
7.11 Certification. Licenses and/or other certification required by Federal, State and/or Local Government law or District certification requirements will be specified by the Board and/or General Manager for each job title. Plant Operator classifications shall be limited to Treatment Plant Operator and/or Collection System Operator certificates issued by the State of California or a District-approved educational institution. Plant Operators shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates. Utility Worker classifications shall be limited to Distribution certificates and/or Collection System certificates issued by the State of California or a District-approved educational institution. Utility Workers shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates.

7.12 Compensation Schedule and Plan. Unrepresented District employees shall receive the compensation provided in the Pay for Performance Plan. The Board may, at any regular meeting or special meeting duly called for that purpose, modify or change the Pay for Performance Plan.

7.13 Salary Plan Administration:

Salary Plan Administration for all unrepresented employees is provided in the District's Pay for Performance Plan.

7.14 Merit Awards. The Board, at its discretion, may by resolution establish a program to pay merit awards to employees for superior and exceptional performance.



7.15 Compensation of the General Manager. The General Manager is directly responsible to the Board of Directors for the successful administration of the District's functions. Because of the nature of duties and responsibilities involved, the salary range of this position shall be specially established by the Board, and the Board shall conduct periodic reviews for the salary advancement of this position. Salary advancement shall be at the discretion of the Board.

SECTION 8.00 - EDUCATION AND TRAINING, AND CONFERENCES

- 8.01 Tuition Reimbursement. The General Manager upon consulting the immediate supervisor concerned shall be responsible for proper training and certification of District employees. Upon approval by the General Manager, and budget approval by the Board of Directors, an employee shall be reimbursed for his/her tuition or registration fees and books upon successful completion of the program for which prior approval has been received and which is directly beneficial to the District. The total annual tuition reimbursement allowable per employee shall not exceed \$1500.
- 8.02 Professional Registration, Certification and Licensing. The District will pay fees when such registration, certification and/or licensing is a requirement of the employee's position.
- 8.03 Professional Activities. The District encourages participation in professional societies and committees when these activities are compatible with and an enhancement to District functions. The District will pay reasonable costs of participation in these activities subject to approval by the General Manager and the limitations of the District budget.
- 8.04 Career Development. Successful completion of training courses may be considered in approving salary advancement and making promotions. Evidence of such activity shall be submitted to the District for inclusion in an employee's personnel records.

** Refer to District Policy 2011-01, Continuing Education and Tuition Reimbursement, for complete details.*

SECTION 9.00 - REIMBURSEMENT OF INCURRED EXPENSES

9.01 Reimbursement for Meals:

Travel Meals. The District will reimburse, upon prior authorization, an employee for meals when the employee travels for District business over meal times. The employee must submit detail itemized receipts to the District to initiate reimbursement.

Overtime Meals. The District will reimburse, upon prior authorization, an employee for a meal when the employee is required to perform work for two (2) hours beyond the regular work hours and for an additional meal for each approximately four (4) hours but not more than five (5) hours, insofar as it is possible for the District to do so. The necessary time taken for the meal shall be at District expense. The employee shall submit detail itemized receipts to the District to initiate reimbursement.

9.02 Reimbursement for Mileage. When authorized in advance by the General Manager, an employee directed to utilize his or her personal vehicle in the conduct of District business shall be entitled to reimbursement at the current District mileage allowance rate. The employee must submit an accounting of actual mileage on District business to initiate reimbursement.

9.03 Reimbursement for Lodging. When authorized in advance by the General Manager, an employee who is away from his or her principal residence on District business may be reimbursed for the reasonable cost of overnight accommodations. The employee must submit receipts to initiate reimbursement.

The General Manager at his or her discretion may allow an "advance allowance" to employees when employees are required to attend training seminars or educational programs. The employee must submit all receipts of expenses to substantiate said advance allowance and any funds not utilized must be promptly returned to the District within thirty (30) days.

** Refer to District Policy 2009-07, Travel and Expense Reimbursement Policy, for complete details.*

SECTION 10.00 - PUBLIC RELATIONS

- 10.01 Public Relations. All employees shall conduct themselves in a manner that will reflect creditably on the District. In dealing with the public, all employees will maintain a polite and helpful attitude.
- 10.02 Grooming & Safety. All employees shall maintain a standard of grooming and safety commensurate with public service. Maintenance personnel shall observe suitable safety precautions when working in situations of unusual potential hazards. Department heads may establish specific grooming and safety standards applicable to the requirements of their operational needs.
- 10.03 Authority to Represent District. No employee shall have any right or authority to make any representation to members of the public or others with whom the District has contracted or is obligated to provide services that the District has legal responsibility for any action, omission or event causing injury, financial loss, damage or inconvenience to any person or property.
- 10.04 Off-Duty Employment. No employee shall accept employment during off-duty hours which may result in a conflict of time or interest, including employment with a party who has a current or pending relationship with the District involving a contract, permit, license, etc.
- 10.05 Acceptance of Gifts. Every District employee is prohibited from soliciting or accepting favors or gifts from the public served by the District, persons seeking to sell goods or services to the District or from other persons or corporations, exceeding in value \$50.00 from any one source in any twelve (12) month period. Acceptance of favors or gifts offered which exceed \$50.00 require prior Board Approval.
- 10.06 Outside Employment.
District Employment Priority. Full-Time employees may not carry on concurrently with their Rancho Murieta Community Services District employment any private business or undertaking, attention to which affects the time or quality of their work or which tends to discredit the District.
Outside Employment Approval. Outside work or private business or undertaking of Full-Time employees shall receive the approval of the General Manager prior to the initiation of the outside employment. Any employment which may result in a conflict of time or interest, including employment with a party who has a current or pending relationship with the District involving a contract, permit, license, etc. is prohibited.

SECTION 11.00 - EQUIPMENT, PREMISES AND UNIFORMS

- 11.01 Motor Vehicle Driving Record Requirements. All employees required to drive as part of their job duties must possess a valid California motor vehicle driver's license and possess a driving record commensurate with the District's ability to protect its insurability under its automobile liability policies. Failure to maintain such a record, affecting an employee's ability to operate a vehicle, is cause for disciplinary action and/or termination. The District participates in the Department of Motor Vehicles Employer Pull Notice Program as a means to keep apprised of the driving records of employee's required to drive as part of their job duties.
- 11.02 Business Usage. Rancho Murieta Community Services District vehicles and equipment are to be used for District business. In the event there's an anticipated need to use a District issued vehicle on personal business, the employee will request permission from the General Manager in advance (such approval shall be provided only under mitigating circumstances and on rare occasion).
- 11.03 Incidental Personal Use. Any employee assigned a District vehicle may not use the vehicle for personal purposes, other than for commuting or de minis personal use (such as a stop for a brief personal errand on the way between a business activity and the employee's home.)
- * Refer to District Policy 2012-05, District Driving Policy, for complete details applicable to Sections 11.01, 11.02 and 11.03.*
- 11.04 Use of Private Vehicle on District Business. In the event there is an anticipated need to use a private vehicle for District business the employee shall be reimbursed at the current District mileage allowance rate.
- * Refer to District Policy 2009-07, Travel and Expense Reimbursement Policy, for complete details applicable to Sections 11.04.*
- 11.05 Safety Equipment. Necessary safety equipment will be purchased and available to all employees of the District who are required to use such equipment on the job. It is the employee's responsibility to utilize, protect and safeguard such equipment from damage. An employee who loses or damages equipment may be required to replace District equipment or to purchase his or her own equipment if, in the opinion of the General Manager, neglect or carelessness on the part of the employee has occurred.
- 11.06 General Use of District Equipment. The District provides vehicles, equipment, tools, supplies and facilities for the use of employees in the performance of their work. Employee use of this equipment for personal reasons is not permitted and is grounds for disciplinary action.
- 11.07 Personal Use of District Premises. Use of District premises for personal use is not permitted except as a member of the public. Written permission is required.

11.08 Uniforms. The District will provide two (2) sets of uniforms per year for each Security Officer. The District contracts with a uniform service for Field Operations employees. Employees are required to wear the uniforms while on duty. District jackets or shirts shall be worn as an outside garment except when the employee is wearing authorized wet weather gear. This display of District uniforms and emblems is to permit identification of employees by the public and to present an appropriate appearance. The employee is responsible for his or her uniforms during employment. Security Officers are responsible for laundering of their uniforms

11.09 Wet Weather Gear. District will provide wet weather gear (raincoat, rain hats, boots, etc.) as may be necessary, up to an amount determined by the District, for employees who are required to work in inclement weather.

** Refer to District Policy 2010-11, Uniform and Dress Guidelines, for complete details applicable to Sections 11.08 and 11.09.*

11.10 Return of District Equipment. The employee and District agree that upon separation from employment the employee will return all District property on his or her last day of work. Failure to do so shall constitute authorization for the District to take all legal recourse available.

11.11 Smoking Policy. Use of tobacco substances (including but not limited to smoking and chewing tobacco) by District employees is restricted to the employee's scheduled work breaks and lunch time.

Use of tobacco is prohibited within any District facility or District vehicle and any areas where the public may be present, including any and all areas where smoking is restricted by law or postings.

Where the use of tobacco is allowed, the using employee shall be responsible for the appropriate non-hazardous containment and disposal of the tobacco wastes including cigarettes, butts, ashes and chewing tobacco spittle.

** Refer to District Policy 2011-10, Use of Tobacco Product On District Property, for complete details applicable to Section 11.11.*

SECTION 12.00 - DISCIPLINARY ACTION AND DISMISSAL

The discipline procedures in this section represent guidelines which the District believes are generally appropriate to govern employee conduct. However, they are not absolute rules. The District retains discretion to determine what constitutes proper disciplinary action and procedure in each individual situation.

These guidelines do not grant any employee a specific guarantee that any particular disciplinary decision or procedure will be utilized by the District. As stated in Section 1.08, all employees serve at the will of the District and may be disciplined (up to and including termination) for any reason the District finds sufficient. No property right, right to be disciplined only for "cause", permanent employee status, or procedural right is conferred by this Personnel Manual.

- 12.01 Initiation of Disciplinary Action or Dismissal. Disciplinary action or dismissal may be initiated by the Board, General Manager on his or her own initiative, or upon written recommendation to the General Manager by the employee's supervisor.
- 12.02 Nature of Disciplinary Action. Disciplinary action may include written warning, suspension with or without pay, involuntary demotion, reduction in pay or dismissal.
- 12.03 Grounds for Disciplinary Action or Dismissal. The District reserves the right to dismiss an employee at any time. All District employees are at-will employees who serve at the pleasure of the District. The following list of causes for disciplinary action is included in this manual for illustrative purposes only. The publication of this list does not confer a right to be disciplined only for "cause". The District may discipline an employee for any reason it deems sufficient. Grounds for disciplinary action or dismissal for Full-Time or Part-Time employees include, but are not limited to, the following:
- (a) Fraud, misrepresentation of fact, or concealment when securing initial or continued appointment with the Rancho Murieta Community Services District;
 - (b) Unauthorized, unjustified, recurring, or excessive absence;
 - (c) Conviction of a felony or other criminal act, which is of a nature to adversely affect the employee's ability to perform the duties and responsibilities of his or her employment;
 - (d) Conduct unbecoming to an employee in public service, tending to bring discredit to the District;
 - (e) Disorderly or immoral conduct;
 - (f) Incapacity due to mental or physical disability when such incapacity so substantially interferes with proper job performance that reasonable accommodation cannot be made;
 - (g) Incompetence and/or inefficiency (i.e. failure to adequately perform job assignments);
 - (h) Insubordination (i.e. willful failure to follow necessary and reasonable directions of supervisor);

- (i) Possession or consumption of alcoholic beverages during work hours or working while intoxicated;
- (j) Possession or use of narcotics, habit-forming, or any illegal or intoxicating drugs or controlled substances during the business workday (other than use of drugs as specifically prescribed by a licensed physician), or being under the influence while at work;
- (k) Inexcusable neglect of duty;
- (l) Negligence of, willful damage to, waste of, or unauthorized use of District's supplies, equipment or premises;
- (m) Failure to follow safety instructions or directions;
- (n) Employee use of District equipment for personal use;
- (o) Participation by an employee in an unauthorized or illegal strike or work stoppage which affects the District or District operations;
- (p) Any conduct which adversely affects the operation of the District, the health and welfare of District employees or the safety of District property;
- (q) Failure to maintain licenses or certifications required to perform the duties of an assigned position;
- (r) Discourteous treatment of the public or other employees;
- (s) Improper political activity during the business workday or on District premises;
- (t) Willful disobedience of safety rules, regulations, policies, practices, and procedures which indicates a lack of concern for injury to self or others; and
- (u) Willful disregard of District rules, regulations or policies.

12.04 Disciplinary Action by General Manager:

- (a) Scope of Authority. Any employee may, by written or verbal order, be suspended, involuntarily demoted, reduced in compensation, or dismissed by the General Manager, or designee.

Notice: In all situations involving a disciplinary action or dismissal of a Full-Time ~~or Part-Time employee~~ who has completed his or her probationary period or Part-Time employee, a notice may be served on the employee either personally or by mail (return receipt requested) at the last known address on file with the District. The notice may include the following:

- (1) The statement of the nature and the proposed effective date of the intended disciplinary action or dismissal;
- (2) A statement of the nature of the causes for action;

- (3) A statement in ordinary and concise language of all specific facts or omissions upon which the causes of the intended action are based;
- (4) A statement that copies of all documents and other materials which support the proposed action are available for examination at the District office; and
- (5) A statement advising the employee of his or her rights to respond orally or in writing to the notice prior to the decision on the intended disciplinary action or dismissal. Any response should be directed to the General Manager and must be made within five (5) calendar days of the date of the notice.

12.05 Suspension Pending Action: Prior to the effective date of any disciplinary action or dismissal, the General Manager, or designee may suspend with or without pay the affected employee if the General Manager, or designee determines such suspension is necessary to protect the health, safety and welfare of the inhabitants and other employees of the District. The rights and benefits provided to an employee so suspended shall not otherwise be affected.

12.06 Review Decision: Prior to a final decision on any intended disciplinary action or dismissal, the General Manager, or designee may consider any written response timely submitted by an employee and may meet with any employee who has timely requested to be orally heard. Such a meeting should take place within five (5) calendar days of the date of the request or on the date mutually agreed upon. The General Manager, or designee shall make a good faith effort to render a decision within ten (10) calendar days of the last day to submit a response, whichever applies. The decision shall be effective the day that it is made and on that day the affected employee may be informed thereof either personally or by mail at his or her last known address on file with the District.

12.07 Effect of Decision:

- (a) When a Full-Time or Part-Time employee is suspended without pay for thirty (30) or fewer calendar days, employee and employer contributions to benefits will be continued. Employee payments for benefits during the period of suspension will be deducted from the last payroll check prior to the date of suspension or the next following payroll check, as may be applicable.
- (b) No benefits will be paid by the District for suspension over thirty (30) calendar days. An employee may continue appropriate benefits by making the payments necessary.

12.08 Effect of Dismissal: Upon the effective date of dismissal, the District shall cease to provide any benefits for the Full-Time or Part-Time employee.

- 12.09 Appeal from Decision. Appeal procedures are established for regular At-Will employees as guidelines for personnel administration, and confer no procedural rights.

A Full-Time or Part-Time employee may appeal a decision to implement an intended disciplinary action or dismissal. The Full-Time or Part-Time employee shall file a Notice of Appeal with the Board within ten (10) business days of the effective date of the decision. The Notice of Appeal shall state the name of the employee, the date and nature of the decision appealed, the name of the person who rendered the decision, and the grounds of the appeal stating all specific facts or omissions upon which the appeal is made. The ~~District Board~~ shall hold a hearing at which time evidence will be received by the ~~Hearing Officer Board~~, no later than sixty (60) days from the date of the appeal, unless otherwise agreed to by the parties. The decision of the ~~Board of Directors~~ General Manager is final.

- 12.10 Failure to File Notice of Appeal. If a Full-Time or Part-Time employee fails to file a Notice of Appeal within the time specified, the disciplinary action or dismissal shall become final without further action.

SECTION 13.00 - LAYOFFS & SEPARATIONS

13.01 Reductions in Workforce; Layoffs:

It is the policy of the District that whenever, in the judgment of the Board of Directors, it becomes necessary to abolish any position of employment, the employee holding such position of employment shall, if no other vacancy within the class exists, be laid off or demoted without disciplinary action and without the right to appeal. A vacancy is one which is not intentionally being held open or unfilled by the District.

13.02 Notification. Employees to be laid off shall be given, whenever possible, at least fourteen (14) calendar days' prior notice.

13.03 Vacancy and Demotion. Except as otherwise provided, whenever there is a reduction in the workforce, the department head shall first demote the employee subject to lay off to a vacancy, if in the same class series or in a lower class for which the employee is qualified. All persons so demoted shall have their names placed on a reemployment list for the class from which they were demoted.

13.04 Employee Rights. An employee affected by layoff shall have the right to displace an employee in the same department who has less seniority in a lower class, in the same class series or in a lower job title in which the affected employee once had regular employee status. For the purpose of this Section and all other purposes, seniority includes all periods of Full-Time service at or above the job title level where layoff is to occur.

13.05 Seniority - Displacement. In order to displace to a former or lower class, an employee must have more seniority than at least one of the incumbents in the lower class and request displacement action in writing to the General Manager within five (5) calendar days of receipt of notice of layoff.

13.06 Salary Upon Layoff Demotion. Employees displaced to a lower class shall be placed at the salary step of the lower class representing the least loss of pay. In no case shall the salary be increased above that received in the class from which the employee was laid off.

13.07 Layoff Order. In each class of positions to be affected by layoff, employees shall be laid off according to employment status in the following order: temporary, probationary, Part-Time and Full-Time regular status.

(a) Temporary and probationary employees shall be laid off according to the needs of the service as determined by the General Manager.

(b) Regular status employees shall be laid off on basis of performance records and qualification.

13.08 Reemployment List. The names of persons laid off shall be carried on reemployment lists for twelve (12) months, except that persons appointed to regular positions of the same level as that which laid off, shall, upon such appointment, be dropped from the list. Persons reemployed in a lower class, or on a temporary basis, shall be continued on the list for the higher position for one (1) year.

13.09 Resignation from Service. An employee electing to leave the District in good standing shall file with the department head a written resignation stating the effective date and reasons for leaving at least two (2) weeks before leaving the service, unless such time limit is waived by the General Manager. Failure to give notice as required by this rule may be cause for denying future employment by the District.

SECTION 14.00 - GRIEVANCES

- 14.01 Purpose of Grievance Procedure. The grievance procedures set forth are designed to resolve grievances informally and to provide an orderly procedure for such resolution. The grievance procedure is available only to regular Full-Time or Part-Time employees.
- 14.02 Policy. Any regular Full-Time or Part-Time employee in the District's employment may make an appointment with their immediate supervisor to discuss his/her work and working conditions, and to discuss any violation, misinterpretation, or inequitable application of these rules and regulations. An employee may present a grievance while on duty, provided such use of on-duty time is kept to a reasonable minimum as determined by the General Manager.
- 14.03 Time Limits. Each person involved in a grievance shall act quickly so that the grievance may be resolved promptly. Each person shall make every effort possible to complete action within the time limits contained within these grievance procedures. But with the written consent of the other parties involved the time limits of any step may be extended.
- 14.04 First Step - Grievance Procedure. This is the informal discussion stage. Within ten (10) calendar days of an event or specific incident giving rise to a grievance, an employee shall seek initial adjustment of the grievance with his/her department head. Should the department head be unable to make a satisfactory adjustment, or be a party to the grievance, the employee may seek adjustment through the General Manager. The employee shall have the decision or response from the department head within five (5) calendar days.
- 14.05 Second Step - Grievance Procedure. This is the formal grievance stage. A written description of the grievance shall be provided to the General Manager. The written description shall include name(s) of grievant(s), date the grievance is initiated, statement of any previous action upon the grievance, a clear statement of the nature of the grievance, a proposed solution to the grievance, and the signature of the grievant(s). The General Manager shall give his/her decision in writing to the grievant(s) within five (5) calendar days after the grievance is filed.
- 14.06 Third Step - Grievance Procedure. Should the General Manager be unable to make a satisfactory adjustment within five (5) calendar days, or be a party to the grievance, the employee may seek adjustment from the Board of Directors within five (5) calendar days of the decision being rendered by the General Manager. If the grievant does not appeal the decision to the Board in writing within five (5) calendar days, the issue will be considered settled. The appeal shall state the date and nature of the grievance, and shall state all specific facts or omissions upon which the appeal is based.
- 14.07 Hearing of Appeal. Within ten (10) calendar days of the filing of an appeal, the Board shall have a meeting with the aggrieved and/or his representative.
- 14.08 Decision on Appeal. Within ten (10) calendar days of the hearing of the appeal, the Board shall issue a written decision concerning the employee's appeal. The decision of the Board of Directors shall be final.
- 14.09 Reports to Board of Directors. The Board of Directors shall receive copies of all formal grievances and all grievance decisions of the General Manager.

14.10 Complaints of Discrimination and Sexual Harassment. If an employee experiences an incident felt to be in violation of the discrimination and/or sexual harassment prohibitions they should report the incident according to Policy 2011-04, Harassment of Any Nature (including Sexual Harassment).

SECTION 15.00 - AFFIRMATIVE ACTION PLAN

- 15.01 General Policy. It shall be the policy of the District to provide equal opportunity in employment for all qualified persons regardless of race, sex, color, religion, national origin, age, sexual preference, ancestry, marital status, pregnancy or physical and mental handicap, and to maintain an affirmative action program of whatever scope is necessary to prevent discrimination. This policy applies to all areas of employment including recruitment, hiring, training, promotion, compensation, benefits, transfer, and social and recreational programs.
- 15.02 Goals. Rancho Murieta Community Services District has adopted an Affirmative Action Program to ensure that personnel decisions are job-related and to further the principle of equal employment opportunity. The District recruits, hires, trains, and promotes qualified persons at all levels of the work force and provides reasonable accommodation to qualified employees and applicants with a known disability who can perform the essential functions of the job.
- 15.03 Designation of Responsible Person. The General Manager is designated as the Affirmative Action Officer for the District. He or she shall be responsible for developing policies and procedures for the District's Affirmative Action Plan and will also be responsible for implementing such policies and procedures.

It is the responsibility of all managers and supervisors to ensure that all personnel actions and programs are administered in accordance with the principle of equality of opportunity and treatment to all.

SECTION 16.00 - DRUG & ALCOHOL ABUSE POLICY

The District has an obligation to its officers, employees and members of the public to take reasonable steps to provide an alcohol and drug free workplace and to deliver services to the public in a safe manner.

No employee shall be under the influence of any substance which impairs safe and productive performance while on District business, or on District property.

** Refer to District Policy 2011-09, Drug and Alcohol Use, for complete details.*

SECTION 17.00 - CONFLICT OF INTEREST

- 17.01 Policy. No employee shall have a direct or indirect interest in District property, property under consideration for purchase by the District, or a contract with the District which violates any laws of the State of California relating to such conflict of interest matters.
- 17.02 Notification Requirements. All notification actions required by the law shall be strictly followed by employees. It shall be the responsibility of employees who may be in potential violation of the statute to familiarize themselves with the provisions and intent of the statute.
- 17.03 Unfair Economic Gain It is the policy of the District that no employee shall be in a position to realize unfair economic gain by virtue of their status with the District.

SECTION 18.00 - INJURY & ILLNESS PREVENTION PROGRAM

- 18.01 Purpose. The District's Injury & Illness Prevention Program is designed to prevent injuries, illnesses, and accidents in the workplace. The primary purpose of this program is to ensure the safety and health of District workers and to provide a safe and healthful work environment. A complete copy of this program is maintained in the Administration Office and is available for each employee's review.
- 18.02 Housekeeping Policy. Good housekeeping is an integral part of any effective program. Keeping work areas neat and clean reduces the chances of accidents and injuries. Well organized work areas also increase the ability of employees to perform their jobs efficiently. Each employee is responsible for keeping their work area neat and orderly. Housekeeping inspections will be conducted in each department on a regular basis.
- 18.03 Responsibility For Safety and Health. All employees of the District are responsible for working safely and maintaining a safe and healthful work environment.
- 18.04 Program Administrator. The Injury and Illness Prevention Program Administrator is the Security Chief. The Administrator is responsible for the overall implementation and maintenance of the District's program.

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CERTIFICATE OF RECEIPT OF RULES

TO RANCHO MURIETA COMMUNITY SERVICES DISTRICT EMPLOYEES:

Welcome to Rancho Murieta Community Services District. I personally hope that you will enjoy working at Rancho Murieta Community Services District and that you will find your work interesting and challenging. As a service-oriented organization, our goal is to conduct our daily activities in a manner reflecting pride, efficiency, and competence with a friendly and courteous attitude.

This PERSONNEL MANUAL has been adopted by the Board of Directors of the Rancho Murieta Community Services District as its regular operating policies. It is designed to be a working guide for both employees and supervisors in the day-to-day operations of the District's personnel program. The text of the manual is not intended to be a legal contract with the employee but rather an attempt to describe generally the way the organization works. The rules and regulations contained in this booklet may not be modified by your supervisor or the General Manager, without the approval of the Board of Directors. However, the General Manager has been granted reasonable administrative latitude to interpret and apply these rules. As time goes on and we encounter some unforeseen problems in administering these rules, or circumstances warrant change, these rules may be modified from time to time as the Board of Directors sees fit. You will be made aware of any official changes to this document. Please insert the new material as you receive it.

This manual should increase understanding, eliminate the need for personal decisions on matters of organizational policy, and help assure uniformity throughout the organization. It affirms that the District retains sole discretion over determination of execution of District goals and policies. It also affirms the at-will status of District employees and does not constitute an employee contract.

Please read this booklet carefully. Do not hesitate to ask for clarification or guidance from your supervisor or your Department Manager.

After reading these rules, **TEAR OUT THE ATTACHED SHEET, SIGN IT, AND RETURN IT TO THE PERSONNEL DEPARTMENT** or designated person within 10 working days of receipt of these rules.

Sincerely,

Tom Hennig
General Manager

RANCHO MURIETA COMMUNITY SERVICES DISTRICT
15160 Jackson Road - PO Box 1050
Rancho Murieta, CA 95683
(916) 354-3700

Employee Statement:

I have read the Rancho Murieta Community Services District's PERSONNEL MANUAL, and I understand I am responsible for compliance with these rules.

NAME:

(Please Print)

SIGNATURE:

DATE:

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

PERSONNEL MANUAL

SECTION 1.00 - GENERAL PROCEDURES

- 1.01 Title. This Manual shall be known as the "Personnel Manual" and may be cited as such.
- 1.02 Purpose. The purpose of the Personnel Manual, as described in the Statement of Purpose on page 1, is to be used to provide guidance for the development and application of personnel management policies for the District.
- 1.03 Non-Discrimination: Employment practices of the District shall fully comply with federal and state equal employment opportunity laws.

- (a) The District shall not discriminate for or against any person based upon race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status, sex, age over 40, or political opinion or affiliation. The District recruits, hires, trains and promotes qualified persons at all levels of the work force; and provides reasonable accommodation to qualified employees and applicants with a known disability who can perform the essential functions of a job.

It is District policy to maintain a work environment free from discriminatory insult, intimidation or harassment due to race, color, religion, sex, age, physical handicap or national origin. Any incident of discriminatory insult, intimidation, or harassment in any form should be promptly reported in accordance with Policy #2011-04.

- (b) The District is committed to providing a work environment for its employees that is free of harassment of any nature. Acts of sexual harassment as well as harassment because of race, religious creed, color, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation or any other basis protected by federal, state or local law, ordinance or regulation by employees, supervisors, managers, or directors, are prohibited employment practices and are subject to sanctions and disciplinary measures, up to and including termination of employment or Board of Directors sanction.

**** Refer to District Policy 2011-04, Harassment of Any Nature (including Sexual Harassment) for policy details and complaint process***

- 1.04 District Rights: The Board of Directors and such persons as the Board may authorize, has the exclusive right, in accordance with applicable laws and regulations, to take certain actions including, but not limited to, the following:
- (a) Directing employees in the performance of their duties
- (b) Hiring, promoting, transferring, classifying and assigning employees
- (c) Disciplining or dismissing employees
- (d) Determining the District's purpose, budget and organization

- (e) Determining and effectuating methods of implementing and foregoing
 - (f) District retains, solely and exclusively, all the rights, powers and authority exercised or held prior to the execution of any labor agreement except as expressly limited by a specific provision of that agreement.
- 1.05 Administration of Rules. The General Manager, subject to the direction of the Board, shall be responsible for the administration of the rules set forth in this Manual. The General Manager is responsible for the interpretation and application of these rules, subject to review by the Board of Directors in cases of disputes.
- 1.06 Delegation of Powers by the General Manager. The General Manager, in his or her discretion, may delegate any of his or her authority set forth in these rules, as he or she may deem appropriate and necessary.
- 1.07 Tenure of Employment. The tenure of every employee shall be based upon continuing satisfactory service, maintaining certifications and licenses that are required by the job, proper personal conduct for the position, as determined by the General Manager, as well as the continued need for the work performed and the availability of funds.
- 1.08 Employment-At-Will Policy. All District employees serve at the will of the District. The District and the employee agree that the District may terminate the employment of any employee regardless of employment status or tenure with the District. Such termination may be made with or without cause. Similarly, the employee may terminate his or her employment with the District at any time with or without cause.
- 1.09 Anti-Nepotism Policy: It is the policy of the District that Immediate Family members, as defined in Section 2.20, and their spouses, of District employees or of elected or appointed officials may only be employed as either Full-Time or Part-Time employees, or as independent contractors of the District when all of the following criteria are met.
1. Such employment does not adversely affect safety, morale, security or supervision, and,
 2. Immediate Family members neither initiate nor participate in making recommendations or decisions that would directly affect the employment status of their spouses or relatives. These recommendations/decisions include but are not limited to selection, appointment, retention, work assignments, promotion, demotion, or salary.

The District may prohibit employment or may reassign Immediate Family members if, in its sole discretion, it finds that any of the above criteria are not met.

If two persons should marry while both are employed by the District, they may continue their employment provided that they meet both of the criteria referenced above. In addition, if one spouse must change his/her job or department so that the above-referenced criteria are met, that choice shall be made by the couple within 30 days of the marriage. However, if the couple does not make this decision within 30 days, the employee with less seniority shall be transferred. If both employees have the same amount of seniority, the District's decision regarding which employee shall be transferred shall be based upon the necessity of operating the District in an efficient manner.

- 1.10 Confidential Nature of Personnel Records. Personnel records such as applications, examination papers, performance reports, and disciplinary actions shall be considered confidential, and upon request shall be made available to the affected employee for review at a time and place designated by the Personnel Department or designated person.

Department heads shall make arrangements with the General Manager for review of their employee's personnel documents.

- 1.11 Change of Status Report. Every appointment, transfer, promotion, change of salary rate, or any other temporary or permanent change in status shall be reported to the Personnel Department or designated person in such manner as prescribed.
- 1.12 Right to Modify. Employment under these rules and regulations shall not constitute an employee contract. This document may be modified from time to time by the Board of Directors as they see fit.

SECTION 2.00 - DEFINITIONS

- 2.01 Appeal. A written statement by the affected employee that a dispute exists in the application of any of the rules contained herein.
- 2.02 Appointment. The offer to and acceptance by a person of a position with the District in accordance with the provisions of these rules.
- 2.03 At-Will Employee. Every District probationary or regular employee serves at the will of the District. Either the District or the employee may terminate the employment relationship at any time with or without cause.
- 2.04 Authorized Position. A specific work position, within a job title, that has been approved by the Board of Directors which is or may be held by an employee.
- 2.05 Board. The Board of Directors of the Rancho Murieta Community Services District.
- 2.06 Class. All positions having sufficiently similar duties and responsibilities to permit grouping under a common title and to permit the application with equity of common standards of selection, assignment and compensation.
- 2.07 Continuous Employment. District employment which is uninterrupted except by authorized absences.
- 2.08 Day. Shall be a calendar day unless otherwise identified.
- 2.09 Demotion. A disciplinary change in job title to a lower salary or salary range which is involuntary.
- 2.10 Department. A major administrative branch of the District, involving a general line of work, with one or more employees under the charge of one or more individuals, known as supervisors.
- 2.11 Disciplinary Action. The discharge, demotion, reduction in pay, or suspension of a regular employee for punitive reasons.
- 2.12 Dismissal. Involuntary termination of employment with the District.
- 2.13 District. Rancho Murieta Community Services District.
- 2.14 Employee. A person who is legally occupying a position in the District service or who is on an authorized leave of absence from such position.
- 2.15 Examination: Any combination of relevant and valid tests of fitness to determine the relative qualifications of competitors for appointment to a position in a class.

Open Competitive Examination. An examination for a particular class which is open to all persons meeting the desirable qualification for the class.

Promotional Examination. An examination for a particular class which is open only to employees with regular status and who meet the desirable qualifications for the class.

- 2.16 Exempt Employee. A person who is employed in a District position that meets the Fair Labor Standard Act ("FLSA") and California requirements of exemption from overtime and certain other protections of the Industrial Welfare Commission Orders.
- 2.17 Full-Time Employee. An at-will employee of the District who is regularly assigned to work forty (40) hours per week in an authorized position and has successfully completed the probationary period.
- 2.18 Good Standing. Any currently employed Full or Part-Time employee not under disciplinary action by the District.
- 2.19 Grievance. Any good faith or reasonable complaint of one or more employees or a dispute between the District and one or more employees involving the terms or conditions of his or her employment.
- 2.20 Immediate Family. An employee's father, mother, step parents, spouse, domestic partner, child, step child, foster child, brother, sister, grandparents, grandchild, or those of the employee's spouse.
- 2.21 Independent Contractor. An independent business person (in business for themselves) who is hired to perform specific tasks. They are not eligible for unemployment, disability, or workers' compensation benefits. The independent contractor is responsible for his/her taxes and workers' compensation insurance.
- 2.22 Intermittent Employee. An employee who works part of a normal work day or a fraction thereof, but such work is done on call with or without a set pattern, or seasonally working less than 1000 hours in a calendar year and at irregular intervals or without a set pattern.
- 2.23 Job Title. Descriptive title of a certain type of job performed by a District employee. Inherent in each job title are certain duties, responsibilities and degrees of authority.
- 2.24 Layoff. The separation of employees from the Rancho Murieta Community Services District's active work force for reasons of lack of work, lack of funds, changing priorities, measures to enhance efficiency, or to accommodate organizational changes.
- 2.25 Leave of Absence. When authorized, an absence from duty for a specified period with the employee having the right to return to his or her position at the end of the period.
- 2.26 Part-Time Employee. An at-will employee of the District who is regularly scheduled to work fewer than forty (40) hours each week in an authorized position and has successfully completed the probationary period.
- 2.27 Performance Evaluation. A review and evaluation of an employee's performance and capabilities in his or her authorized position by his or her immediate supervisor.
- 2.28 Personnel Manual/Rules. This group of rules and procedures concerning District Employment.
- 2.29 Position. A group of assigned duties and responsibilities assigned or delegated by competent authority, requiring the Full or Part-Time employment of one person.

- 2.30 Probationary Employee. A newly hired employee working for a designated period of time. Such employees may be dismissed without prior notice and without cause and do not have rights described in the Disciplinary Action and Dismissal section of this Personnel Manual.
- 2.31 Promotion. The movement of an employee from one job class to another job class with a higher maximum salary.
- 2.32 Reduction in Pay. A temporary or permanent decrease in wage or salary.
- 2.33 Regular Employee. A Full-Time or Part-Time at-will District employee who has successfully completed his or her probationary period.
- 2.34 Reinstatement. The restoration, without examination, of a former regular employee to a job title in which the employee formerly served as a regular non-probationary employee.
- 2.35 Salary Advancement. Any salary increase within the limits of a salary range.
- 2.36 Salary Range. Categories which determine the minimum and maximum wage pay for each employment job title.
- 2.37 Salary Reduction. A salary decrease of one or more steps within the limits of a salary range.
- 2.38 Salary Step. A level of salary payable in each salary range.
- 2.39 Seniority. The length of service of a regular employee with the District.
- 2.40 Sick Leave. An excused paid absence from duty by an employee due to illness as described in Section 5.22
- 2.41 Supervisor. A person who has day-to-day direct responsibility over the work of a specific employee.
- 2.42 Suspension. A District-mandated temporary separation from employment.
- 2.43 Temporary Employee. An at-will employee hired to fill a position of limited duration or service (not to exceed 960 hours per fiscal year for retired annuitants or 1000 hours per calendar year for all other Temporary Employees), or, a position with uncertain, long term funding. The employee may serve during a limited service period and then be terminated without regular employment status with the Rancho Murieta Community Services District. Temporary employees have no reasonable expectation that they will be called or re-employed by the District in the future. They receive no District paid benefits or leave.
- 2.44 Termination. The conclusion or cessation of employment with the District, whether initiated by the District or the employee.
- 2.45 Timebase. Timebase refers to the number of hours an employee works and to the regularity with which the employee works. Timebase does not refer to an employee's employment status, i.e. regular, probationary, temporary, etc.

Types of Timebase:

- (a) Full-Time. Employee works the normal number of working hours assigned to the class.
 - (b) Part-Time. Employee works a fraction of the normal work day, normally follows a pre-determined pattern of working hours.
 - (c) Temporary. Employee may work a normal work day or fraction thereof, but such work is done on-call with or without a set pattern, or seasonally working less than 960 hours per fiscal year for retired annuitants or 1000 hours per calendar year at irregular intervals and without a set pattern.
- 2.46 Time-Off. Authorized absence from job duties, either compensated or uncompensated.
- 2.47 Transfer. A change of an employee from one position to another position in the same class.
- 2.48 Unrepresented Employee. A person who is legally occupying a position in the District service or who is on an authorized leave of absence from such position that is not represented by a union or bargaining unit.
- 2.49 Vacancy. An unfilled authorized position in the District.

SECTION 3.00 - FILLING VACANCIES, JOB ANNOUNCEMENTS, APPLICATIONS AND QUALIFICATIONS

3.01 Vacancies. When a vacancy occurs in an authorized position, the General Manager (or Acting General Manager if the General Manager position is vacant) shall, whenever reasonable, fill the vacant position with an existing District employee who is both qualified for the position and willing to accept the employment change. However, the General Manager may in his/her sole discretion determine that it is in the District's best interest to leave the position vacant or to fill the vacancy with a person who is not a current District employee. This section shall not be construed to limit in any way the District's right to hire the most qualified persons at all levels available as District employees.

3.02 Announcements: The Personnel department shall publish announcements of vacancies which shall state the employment standards of the position and pertinent information. Employment standards shall be established by the Board and included in the job class.

Announcements shall be considered published when they are posted on the District bulletin board.

The Personnel department may additionally publish notices of vacancies as deemed appropriate for recruiting qualified applicants.

(a) Announcements shall briefly specify the title and pay range of a position; the nature of the work to be performed; essential qualifications necessary for successful job performance of the work; the dates, time, place, and manner of receiving applications and administering examinations; and other pertinent information. All announcements shall include a statement that the Rancho Murieta Community Services District is an Equal Opportunity Employer, as well as an Affirmative Action Employer.

3.03 Qualification of Applicants: No person shall be employed in or appointed to any position requiring Full-Time or Part-Time service unless he or she meets the minimum qualifications of the education and experience prescribed for that class. In extraordinary situations, the Board may waive a stated requirement for a supervisory applicant and the General Manager may waive a stated requirement for a non-supervisory applicant.

(a) Applicants must have met applicable minimum qualification requirements by 5:00 p.m. of the final filing date.

(b) In the event an applicant is found to possess qualifications extraordinary for the position the applicant is being hired for, the General Manager may authorize the employment of such applicant anywhere within the appropriate pay range. For the purposes of this section, "extraordinary" means that the applicant has education, experience, and/or skills superior to that commonly required and expected for the class. Details of this action will be forwarded to the Board at their next regularly scheduled meeting.

- 3.04 Forms Required. Application shall be made on forms prescribed by the General Manager. Application forms shall require information covering training, experience, and other pertinent information, and may include certificates of one or more examining physicians, and references. Fingerprints shall be required for all District personnel. All applications must be signed by the person applying under penalty of perjury.
- 3.05 Submitting Applications. Applications must be received by the District not later than 5:00 p.m. on the final filing date. Applicants are responsible for getting their applications to the District by this time.
- 3.06 Disqualification: The General Manager may disqualify an applicant for any of the following reasons:
- (a) Untimeliness of Application. Failure to submit the required application to the District not later than 5:00 p.m. on the final filing date. Applicants are responsible for getting their applications to the District by this time.
 - (b) Unqualified for Position. Failure to demonstrate that the requirements or qualifications established for the authorized position have been met.
 - (c) Conviction Record. Conviction of a felony or misdemeanor which was of such a nature as to have a clearly adverse effect on the applicant's ability to perform the duties of the position.
 - (d) False Statement. False statement of material fact; or actual or attempted deception, fraud, or misconduct on an application; or actual or attempted deception, fraud or misconduct during an interview or examination.
 - (e) Failure to complete process. Failure to complete the pre-hire process as required by the District.
- 3.07 Notice of Rejection. Whenever an application is rejected, written notice of such rejection shall be mailed to the applicant. Incomplete or deficient applications may be returned to the applicant for amendment. Unless otherwise approved by the General Manager, such amendments must be received by the District not less than forty-eight (48) hours prior to the scheduled interview or examination.
- 3.08 Medical Examination*:
- (a) All individuals who are offered full-time, temporary, or part-time employment shall be required to submit to a physician's examination. For public health and safety related positions, (i.e., Security Patrol, Equipment Mechanic, Plant Operators and Utility Workers) a controlled substance test at District expense will also be required. Such examination shall be performed by a licensed physician retained by the District. Documents indicating that the applicant has received a medical clearance shall be kept in a confidential file under the custody of the Personnel Department and shall not be a part of the personnel file.
 - (b) The General Manager may, upon advice and consultation with competent medical authority, establish job related physical standards for each job title. An applicant's failure to achieve the minimum standard so established will result in disqualification for appointment.

- (c) Nothing in this section shall serve to disqualify an applicant who has a disability and can be reasonably accommodated under provisions of the Americans with Disabilities Act.

**** Refer to District Policy 2012-06, Pre-Employment Physical Examinations, for policy details***

3.09 Work Eligibility. A candidate for employment must be eligible under appropriate federal regulations to work in the United States. It is the policy of the District to hire only citizens of the United States or others authorized to work in the United States. Documentation of eligibility to work in the United States will be required as a condition of employment.

3.10 Driver's License*. A candidate for employment must possess and maintain a valid California motor vehicle driver's license at the required level, if driving is required in the duties of a position, or if driving is not required, a California Identification Card. Insurability and compliance with established District vehicle operation standards are a condition of employment.

**** Refer to District Policy 2012-05, District Driving Policy, for policy details***

3.11 Method of Examination. The selection techniques used in the examination process shall be impartial and relate to those subjects which measure the relative capacities of the persons examined to execute the duties and responsibilities of the class to which they seek to be appointed. Only those applicants possessing the most relevant qualifications will be invited to continue the application process.

3.12 Screening Panel. A credentials screening panel may be assembled by the General Manager to evaluate the comparative qualifications of the applicants, when it is desirable or necessary to limit the number of candidates to be interviewed for a given position. To allow full consideration of the relevance, level, recency, progression and quality of candidates' education and experience, the applicant may be required to submit written statements, certifications, and/or transcripts of college credits in addition to the standard application form.

Should there not be sufficient qualified candidates to screen, the General Manager may extend the final filing date of the job in question for the length of time he or she finds necessary to recruit a reasonable number of qualified applicants.

3.13 Examination Scheduling. Examinations will be scheduled as the need requires, and may be postponed, canceled, or extended by the General Manager by notifying all persons who have filed applications and/or by posting a notice on the bulletin board.

3.14 Conduct of Examination: The General Manager shall determine the manner and methods by which examinations shall be given. The General Manager may recommend a contract with any competent agency or individual for the preparation or scoring of examinations. The General Manager shall arrange for the use of facilities, equipment, and related matter for the conduct of examinations.

(a) The General Manager may disqualify:

- (1) Any candidate who attempts to interfere with the fair, equitable and orderly conduct of an examination process.
- (2) Any candidate who is tardy for the examination.

- (3) Any candidate who fails to appear for an examination.
 - (4) Any candidate who has not certified in writing that he or she possesses the minimum qualifications for the position.
 - (5) Any candidate whose application was either not received or postmarked on or before the filing date.
- (b) Oral Interview Panel. The General Manager may assemble an Oral Interview Panel to conduct oral interviews and advise the General Manager and the Board regarding the selection of a qualified candidate to fill an authorized position.
 - (c) Notification. Each candidate taking an examination shall be given written notice regarding the District's determination.
- 3.15 Power of Appointment. The position of General Manager shall be filled by Board appointment. The General Manager shall appoint successful candidates to fill all other vacant positions.
- 3.16 Probationary Period:
- (a) Before employing a person as a Full-Time or Part-Time regular at-will employee, the District shall employ that person as a Probationary Employee for a period of at least twelve (12) months. The General Manager may extend the probation period beyond twelve (12) months. Any extension of the probationary period shall also extend the probationary status of the employee as defined in Section 3.16(b) and (c) below.
 - (b) The probationary period is a step in the District's hiring process. It allows the Probationary Employee and the District an opportunity to determine if this is the right job for this person and the right person for the job. This is a learning and adjustment period for the employee. The District will use the probationary period to continue its assessment of an applicant for regular at-will employment.
 - (c) At any time during the probationary period, the Probationary Employee or the District may terminate the employment relationship without cause and without any right of appeal.
 - (d) During the probationary period, the Probationary Employee may be terminated at any time without prior notice.
- 3.17 Background Security Check.
- After a tentative employment offer, a fingerprint Live Scan process shall be completed at a Live Scan facility and forwarded to the Bureau of Criminal Identification Investigations, State Department of Justice, for processing on each prospective employee who has passed his/her interview.
- No person shall be employed by the District who has been convicted of a serious or violent felony. Serious or violent felony as used in this paragraph means a serious felony as listed in Penal Code Section 1192.7(c). Violent felony as used in this paragraph means a violent felony as listed in Penal Code Section 667.5.

SECTION 4.00 - TEMPORARY EMPLOYEES

- 4.01 Hiring of Temporary Employees. Temporary Employees, as defined in Section 2.43, may be hired from time to time as needed. The General Manager shall determine the terms and conditions of each Temporary Employee's employment. These terms and conditions will be decided for each individual prior to actual employment, but shall not exceed 1,000 hours or 180 days for each separate temporary employment. A Temporary Employee may serve on an on-call, as-needed basis, or may be hired for a specific project or period of time.
- 4.02 Salary of Temporary Employees. The General Manager, subject to approval or ratification of the Board, shall determine the rates and amount of pay for each Temporary Employee. The factors taken into consideration will include the type of work to be performed and the anticipated duration of employment. The rate of compensation may be by piece work, by the hour, by the day, by the week or by the month, as determined to be most feasible, reasonable, and equitable in each case.
- 4.03 Termination of Temporary Employees. A Temporary Employee serves at the will or pleasure of the District Board and may be terminated at any time without cause or prior notice. A Temporary Employee does not have the rights described in the Disciplinary Action & Dismissal section of this Personnel Manual.

SECTION 5.00 - EMPLOYMENT HOURS, LEAVE, VACATION AND HOLIDAYS

5.01 Hours of Work:

- (a) Workweek (General Criteria). The normal hours of work for District employees shall consist of eight (8) hours per day, five (5) days per week. Specific work schedules may be established to comply with legal requirements or to meet agency business and public service needs, to include any of the following: 5/40, 4/10 or 9/80 workweek as directed by the Board of Directors.
- (b) Standard Workweek. The normal workweek is defined as forty (40) hours within seven (7) consecutive 24-hour periods. The District defines the start of the workweek on Sundays. . Any program providing for employee work weeks of less than forty (40) hours within seven (7) consecutive 24-hour periods, shall be subject to Board approval. The hours of operation shall be recommended by Department Heads to accommodate the type of work required and approved by the General Manager.
- (c) Rest Periods. When practical employees shall be allowed a rest period of ten (10) minutes during each four (4) consecutive hours of work. Such rest periods shall be scheduled in accordance with department head or supervisor requirements. Except as indicated below, an unpaid meal period of at least thirty (30) minutes may also be provided as designated by the District to occur approximately in the middle of a work shift of at least eight (8) hours.

In certain positions, District management may require or permit employees to incorporate a paid (working) meal period within the normal work shift.

- (d) Rest Period Conditions. The District may designate areas where rest periods may be taken. An employee may occasionally be required to perform duties, if necessary, during his/her normally scheduled rest period.

5.02 Attendance. Employees shall be in attendance at their work in accordance with the rules regarding hours of work, holidays, and leaves. The General Manager shall enforce attendance requirements and maintain attendance records of employees. Any absence from work, taken upon the initiative of an employee, without prior authorization or as provided for in these rules, shall be the basis for disciplinary action, if such absence is found to be unwarranted or regarded as detrimental to the District.

5.03 Overtime:

- (a) Policy. The general policy of the District will be to discourage the use of overtime. Overtime must be authorized in advance by the General Manager, or an employee's supervisor. Overtime shall be authorized only in those instances where it is essential to the continued operation of the District.
- (b) Definition. Work authorized in excess of normal working hours except as provided for in stand-by and call-back time, shall be classified as overtime when an employee's total work time exceeds forty (40) hours

during the specified District work week. Overtime shall be compensated at the rate of 1-1/2 hours of compensation for each overtime hour worked.

- (c) Computation Base. Work schedules may provide for workdays exceeding nine (9) hours. Any employee who is required to work more than forty (40) hours in a work week shall receive overtime pay. Work time does not include paid leave time such as vacation, sick leave, bereavement leave, etc.
- (d) District Work Week. The District work week begins at 12:00 midnight on Sunday morning and ends at 12:00 midnight on Saturday night each week.
- (e) Holiday Overtime. Employees required to work on an observed holiday shall receive up to eight (8) hours holiday pay plus time and one-half for any hours worked on that holiday.
- (f) Overtime Exclusions. Employees designated as managers, department heads, or other exempt classes shall be exempt from overtime compensation of any kind.
- (g) Hours Not Counted Toward Overtime Computation. Sick leave, vacation, bereavement leave, jury duty, and personal holiday time are not considered to be hours worked for purposes of computation of overtime pay.

5.04 Shift Differential/Split Shift for District Employees. Upon prior approval of the Board of Directors, all District employees working the graveyard shift during the hours of 12:00 a.m. (midnight) until 6:00 a.m. or working a split shift shall receive a shift differential or split shift amount as determined by the Board of Directors. This shift differential shall be paid along with the regular payroll cycle.

5.05 Standby Duty. In order to maintain a high standard of emergency services to the Community, Field Operation personnel are required to be available for on-call duty. All Field Operation personnel (who have completed their probationary periods) may be required to participate. Employees on standby status must be ready to respond immediately to calls for service; to be reachable by radio-controlled pager, radio, or telephone; and to refrain from activities which might impair the employee's ability to perform assigned duties. Employees assigned to Standby Duty will be paid a fixed daily rate, as determined by the District, for Standby Pay. An employee on Standby Duty will be compensated according to Section 5.05 for each instance of call-back duty.

5.06 Call-Back. The nature of District services and the consequences involved in potential damage to property and buildings may make it necessary to call-back a District employee or employees, outside of the employee's normally assigned work-shift, to make emergency repairs or deal with an emergency situation. An employee called-back in such a situation shall receive a minimum of two (2) hours pay at 1-1/2 times his/her normal hourly pay rate and mileage reimbursement for round trip at the current approved District mileage rate. Call-back pay and mileage reimbursement shall not apply to exempt employees.

- 5.07 Jury Duty and Court Appearances. This section shall not apply to any employee who is named party to action unrelated to the District and its activities or suits against the District. In such cases, employees may request vacation or personal leave.

When an employee is required to serve on jury duty or is subpoenaed as a witness to appear before a court, administrative agency, public body or commission, the employee must promptly notify his or her supervisor. Employees who are Sacramento County residents or residents of other counties with "phone-in" juror programs are requested to first ask the court to put them on "phone-in juror status". Employees required to serve as jurors for less than a full day are expected to spend the balance of the day at their regular District positions when the time remaining for their work shift exceeds three (3) hours.

- (a) Employees who receive a daily stipend from the court for serving on a jury shall submit their stipend pay, for each day they also receive District Jury Duty pay, to the District. Employees are entitled to keep all mileage reimbursement received, if any.
- (b) If there is an emergency situation or if the District has special need for the employee's services, the General Manager will ask the court to excuse the employee from jury duty.

5.08 Special Leaves:

- (a) Special Leave. On rare occasions, due to special circumstances, the District may find it necessary to place an employee on a special leave status, with or without pay, as warranted by the special circumstances. The District may authorize this unusual leave, with or without pay, and maintain an employee's usual employment status during a stipulated time period.

- (b) Authorized Leave of Absence:

- (i) A regular Full-Time or regular Part-Time employee who has completed his or her probationary period may be allowed up to thirty (30) days leave of absence per calendar year without pay for acceptable reasons upon the prior written approval of the General Manager.
- (ii) A leave of absence over thirty (30) days requires the prior approval of the Board.
- (iii) The District will continue to pay health and other benefits for an employee while the employee is on an authorized, unpaid leave of absence for up to 90 days during any twelve (12) month period. The District will cease to pay health and other benefits for an employee who is on an authorized, unpaid leave of absence for more than 90 days for the remaining duration of the leave of absence.

An employee's salary advancement date shall be delayed accordingly, unless a special exception has been expressly approved in writing by the General Manager.

- (c) Bereavement Leave. Up to three (3) working days of leave with pay may be granted because of death in an employee's Immediate Family, as defined in Section 2.20.

- (d) Disability Leave. Any employee incurring a non-work time injury or disability outside District employment shall be entitled to disability leave as provided herein. A maximum of thirty (30) days may be granted by the General Manager upon proper medical certification that the employee is disabled to the extent that work performance is not possible.

Only the Board may approve a request for disability leave for over thirty (30) days. An employee is entitled to elect usage of accumulated sick leave and/or vacation time during disability leave.

Following exhaustion of accumulated vacation and sick leave balances, the disability leave will be on an unpaid basis. An employee may also choose that the entire disability leave be on unpaid status without reducing accumulated vacation or sick leave balances.

Medical certification must be submitted at the initiation of disability leave and monthly thereafter. The certification must state the nature of the disability and the estimated return to work date. Sick leave, rather than special disability designation, will apply to leave periods of five (5) calendar days or less.

An employee shall not earn additional vacation, sick leave, or other benefits except medical insurance during disability leave for a period of up to six (6) months maximum. Also, an employee's salary advancement date shall be adjusted during disability leave, thereby delaying eligibility for a salary increase/step increase within a salary range.

- (e) Preferential Re-hire. With the approval of the General Manager, a former regular employee may be granted preferential rehire status. These are employees who have been placed on an extended leave of absence due to injury on or off the job where the District has found it necessary to replace the employee with another employee in order to meet critical workload. Employees granted preferential re-hire status may, at the District's discretion, be reinstated to the same or a comparable position when a vacancy occurs.

- (f) Leave Without Pay. Leave without pay may be granted to an employee by the General Manager whenever the General Manager considers such leave to be in the best interest of the District.

An employee on leave without pay status for five (5) days or more during a pay period shall not earn vacation, sick leave, insurance, or other benefits for that pay period, and the employee's salary advancement date shall be delayed accordingly, unless a special exception has been expressly approved in writing by the General Manager.

Failure of an employee on leave without pay to report to work promptly at the leave's expiration or within reasonable time after notice to return to duty shall be cause for discipline.

- (g) Military Leave. Military Leave shall be granted in accordance with Section 395 of the California Military and Veterans Code and Federal Military Leave regulations. An employee entitled to military leave shall give the General Manager an opportunity within the limits of military regulations to determine when such leave shall be taken.
- (h) Pregnancy Leave. An employee may be granted a prolonged time off without terminating employment for pregnancy and maternity. Such leave shall be governed by the same standards applicable to any other leave for non-job related medical or disability reasons. Such leave will normally be without pay, except as provided below, and it will be granted with the expectation that the employee will return to work at a stipulated time.

An employee may elect to exhaust their accumulated sick and vacation time during pregnancy leave. While an employee is on unpaid pregnancy leave status no additional leave or service credits, with the exception of health benefits, will be granted. Pregnancy leave allows an employee to return to her former position or a comparable position.

- (i) Work-Related Injuries and Work-Related Injury or Illness Leave of Absence. Any work related injury or illness regardless of how minor must be immediately reported to the employee's supervisor or other available supervisory personnel.

An employee who requires a work-related injury or illness leave of absence ("leave") must notify the General Manager in writing of the need for such a leave as soon as the employee learns that they are or will become temporarily disabled and unable to work due to a work-related injury or illness. The notice must specify the reason for the leave, the date such leave will begin, and the expected duration of the disability. An employee who requests such a leave may be required to provide an initial proof of disability and from time to time a continued proof of disability in the form of a physician's statement and/or be examined by a District selected physician.

The leave shall be granted for the duration of the work-related disability or to the extent provided by law. Accrued vacation and sick leave may be used to supplement any worker's compensation benefits for the initial days not covered by Workers Compensation or other disability insurance benefits received by the employee during the leave. An employee may elect not to use accumulated leave time. In no case shall the employee's compensation while on leave exceed their regular earnings. An employee shall continue to earn benefits while on leave for up to one (1) year.

An employee who is on a leave for a period in excess of three (3) months must notify the District by the end of each month thereafter both of the status of the disability and their continued intent to return to work with the District once they recover from the disability. An employee returning from a leave shall be required to provide a physician's statement which indicates that they are fit to return to work and/or be examined by a District selected physician.

A request for an extension of a leave will be considered if it is received by the General Manager in writing prior to the expiration of the approved leave and is supported by proof of continued disability in the form of a physician's statement. The District may require an employee to be examined by a District selected physician before acting upon a leave extension request.

An employee who fails to report for work at the end of a leave will be considered to have voluntarily resigned. The District will retain an employee on leave until one of the following situations occurs:

- 1) The employee is released for full duty.
- 2) The District receives medical evidence satisfactory to it that the employee will be permanently unable to return to work.
- 3) The employee directly or indirectly informs the District i.e., by resignation, accepting other employment, moving out of the state, etc., that they do not intend to return to the District's employ.

An employee who returns to work at the end of their leave will be returned to their former position, if possible, or will be offered the first available opening in a comparable position for which the employee is qualified. The employee must provide the District a physician's statement indicating that they are fit to return to work and/or be released to return to work by a District selected physician.

- (j) Administrative Leave. Administrative leave compensates specified exempt employees for hours worked in excess of the normal work week of forty (40) hours per week, that are ineligible for standby pay and/or overtime.

On July 1st of each fiscal year, the following classifications shall be granted 80 hours of administrative leave.

Director of Administration
Director of Operations
Security Supervisor
Accounting Manager
District Secretary

Employees beginning District employment after July 1st shall receive a pro rata amount of administrative leave, computed on a 26 pay period basis.

Administrative leave may be used for whatever reason and shall be taken as scheduled with the General Manager's approval. Administrative leave shall be accumulated from one year to the next, with a maximum of 40 hours carried over. Any administrative leave

beyond the allowable 40 hours remaining to the exempt employee's credit at the end of the year shall be lost without compensation. Upon separation from the District, any administrative leave remaining shall be paid to the employee.

5.09 Unauthorized Absence:

- (a) Any employee, who is absent for three (3) calendar days without being on authorized sick leave, authorized vacation leave, authorized bereavement leave or authorized leave of absence shall automatically have resigned his or her employment with the District. An unauthorized absence during part of a day constitutes an unauthorized absence for an entire day.
- (b) Nothing in this section shall limit the General Manager's authority to discipline or dismiss an employee due to an unauthorized absence.
- (c) An employee terminating employment in the manner described in this section will be considered to have voluntarily resigned his or her District employment.

5.10 Paid Holidays for Full-Time or Part-Time Employees:

- (a) New Year's Day (January 1)
- (b) President's Day (3rd Monday in February)
- (c) Memorial Day (last Monday in May)
- (d) Fourth of July
- (e) Labor Day (1st Monday in September)
- (f) Thanksgiving Day (4th Thursday in November)
- (g) Day after Thanksgiving
- (h) Christmas Day (December 25)

In addition to the designated holidays listed above, other days or portions of days may be authorized by official proclamation of the President of the Board of Directors. The President may take such action to coincide with holidays declared by the President of the United States, the Governor of the State of California, or when in the opinion of the President a significantly important local event merits such action.

For employees regularly assigned to a five-day, Monday through Friday work schedule, recognized holidays which fall on a Saturday will be observed on a Friday, those falling on a Sunday will be observed on a Monday. For all other employees, holidays will be observed on the actual declared holiday. In the event there is any work performed on any of the above-mentioned holidays, the employee shall receive a full day (dependent upon work schedule hours) holiday pay plus time and one-half for any hours worked on that holiday

5.11 Personal Holiday. A regular Full Time employee who has completed his or her twelve (12) month probationary period may take four (4) "personal holidays" with pay per

year. The employee must give his or her supervisor at least two (2) weeks advance notice and receive authorization before taking the personal holiday.

A regular Part-Time employee who has completed his or her twelve (12) month probationary period shall accrue personal holiday hours with pay in the same proportion as his or her working hours bear to the normal working hours of a Full-Time employee in a comparable position.

5.12 Vacation:

Probationary Employees. A new employee with Rancho Murieta Community Services District, filling a position which is eligible for regular Full-Time appointment, shall begin the accrual of both sick leave and vacation time credits upon hire date.

Accrual Rate.

All employees who are employed on a continuous Full-Time basis shall accrue annual leave credits for each regular hour paid on the basis of the schedule below:

<u>Years of Continuous Service</u>	<u>Hours Accrued per Hour Paid</u>	<u>Max Hours of Accrual/Year</u>
Year 1 through 2	.0463	96
Year 3 through 4	.0616	128
Year 5 through 10	.0731	152
Year 11 through 14	.0847	176
Year 15+	.0962	200

5.13 Pro-rated Accruals. Part-Time employees shall earn service and vacation credits at a ratio of their hours worked to Full-Time employment. In other words, the earning rates for a 20-hour per week employee shall be at 50%, a 30-hour per week employee shall be at 75%, a 32-hour per week employee shall be at 80%, etc. No vacation, sick leave or other paid benefits are provided for temporary employees.

5.14 Usage Waiting Period. No vacation leave may be granted until an employee has completed at least six (6) months of continuous service with the District. At no time may an employee take vacation leave in excess of their accumulated balance.

5.15 Accumulation of Vacation Time:

(a) An employee may accumulate up to two (2) years of vacation accrual of vacation leave. If an employee's vacation balance exceeds this amount, they shall cease to earn vacation credits until their balance is less than the maximum accrual amount.

For example, if you accrue ten (10) vacation days per year (6 2/3 hours of vacation per month), you may accrue a maximum of twenty (20) unused days of vacation. You will not be eligible to accrue more until some of the twenty (20) days are used. At no time may you "save" any more than your twenty (20) day maximum.

(b) All employees are encouraged to take at least five (5) consecutive days of vacation leave each year.

- (c) Upon approval of the General Manager an employee may receive pay for his/her earned vacation instead of taking time off, after the initial six (6) month probationary period, provided that the employee has taken at least five (5) consecutive days of vacation, administration leave and/or personal holiday time off during that year. In addition, the employee must have at least (forty) 40 hours of accrued vacation time remaining after the buy back. The vacation buy-back will be an annual event in early December coinciding with a regular pay cycle.
- 5.16 Accrued Vacation Time. Vacation time earned, to a maximum of two (2) years vacation allotment but not used by an employee at the date of adoption of this manual shall continue as a credit for vacation time.
- 5.17 Authority to Grant Time-Off. The times at which an employee may take vacation shall be at the discretion of his/her immediate supervisor and department manager. Requests will be granted with due regard for the wishes of an employee and particular regard for the need of the District to conduct business and provide services. The General Manager has the authority to ultimately deny a request for vacation leave if he/she deems it in the best interest of the District.
- 5.18 Holiday Adjustments. Holidays falling within an employee's authorized leave period shall not be charged as vacation time.
- 5.19 Double Compensation Prohibition. Double compensation for any day(s) worked or leave claimed is prohibited. For example, an employee shall not claim regular hours, vacation leave or sick leave for the same day(s) in a pay period.
- 5.20 Disposition of Vacation Time Upon Termination. Upon separation from employment, regular and probationary employees will be paid for their accrued vacation time. If an employee has used more vacation time than he or she has accrued, the District and the employee agree that the excess will be deducted from the employee's final check.
- 5.21 Scheduling of Vacation:
- (a) No employee has a right to take his or her vacation at a particular time. Supervisors and department managers may only grant vacation requests if District operations will not be adversely affected.
 - (b)
 - (c) Should a conflict arise in the scheduling of vacations, the conflict will be resolved in favor of the employee with the greater seniority within his or her current job title. However, seniority may be exercised only once by each employee in each successive choice of vacation periods.
 - (d) Requests for vacation which are made after the posted period, will be granted only where vacancies exist or staffing requirements permit and only with approval of the employee's supervisor and department manager.
 - (e) Employee requests for modification of the vacation schedule will usually be granted if submitted 2 weeks in advance and the request may be accommodated. Supervisor and department manager approval is required for any modifications.

5.22 Sick Leave Policy. Sick leave with pay is an insurance or protection granted in circumstances of adversity and to promote the health of the individual employee. It is not an earned right to time off from work except as specified in this policy and is not to be confused with vacation or other types of leave. It is a request for entitlement to a benefit to be exercised under appropriate circumstances. When used judiciously, sick leave benefit accruals provide the employee a cushion in the event the employee encounters a major or catastrophic illness or injury.

Paid sick leave will be granted by the District when an employee must be absent because of (1) the employee's illness, medical or dental examination, injury, disability or exposure to contagious disease which incapacitates the employee from performing his or her duty or (2) the employee's attendance with a member of the employee's Immediate Family because of illness, injury, death (over that allowed for bereavement leave), or exposure to contagious disease and where the attendance of the employee is definitely required.

5.23 Accrual of Paid Sick Leave for Full and Part-Time Employees:

- (a) All employees who are employed on a continuous full-time or part-time basis shall accrue sick leave credits on the basis of up to 3.69 hours (.04615 per hour paid) per pay period to a maximum of 96 hours per year. Sick leave may accrue without limitation.
- (b) Part-Time employees shall earn sick leave credits at a ratio of one hour earned per every 30 hours worked.
- (c) All accrued sick leave may be used in the event of a catastrophic illness or injury.

5.24 Unused Sick Leave. No employee shall be compensated directly for accrued but unused sick leave upon termination of employment; however, accrued sick leave may be converted to time worked for the purposes of retirement under the District's contract with PERS.

5.25 Use of Sick Leave. Sick Leave must be accrued before taken or used.

5.26 Election Concerning Sick Leave. Refer to Section 5.08 (d) regarding election of sick leave during a disability leave and Section 5.08 (i) regarding election of sick leave during a worker's compensation leave.

5.27 Evidence of Illness. The General Manager may require any employee who is absent due to illness or injury to be examined by the District's doctor.

At the General Manager's discretion, satisfactory evidence of illness or injury for any period of absence due to illness or injury may be required prior to the employee's return to duty.

The General Manager shall have the discretion to require the employee to present a personal treating physician's certificate upon his or her return to duty stating that the employee has fully recuperated from the illness and/or injury and has no physical or mental limitations preventing the employee from performing his or her required job responsibilities. Until such a certificate is presented, the General Manager shall have the

right to disallow the employee's return to work. In such cases, the employee shall continue to use accrued sick leave, if any, or shall be on authorized leave of absence without pay.

- 5.28 Unearned Sick Leave. Sick leave with pay shall not be allowed or taken until accrued. Sick leave will not be advanced.
- 5.29 Extended Sick Leave Without Pay. Any request for extended sick leave without pay due to illness or injury shall be at the discretion and approval of the General Manager. At the time of the request, the Full-Time or Part-Time employee shall submit a physician's certificate to support the request. The General Manager may approve a request for sick leave without pay for a period of up to thirty (30) days. Only the Board may approve a request for sick leave without pay for over thirty (30) days. In the event the extended sick leave qualifies as FMLA or CFRA leave, the provisions of those acts will take precedence and this Section will apply after the expiration of the leave times provided by those acts.
- 5.30 Non-Payment Upon Termination. Upon termination for any reason from District employment, an employee is not entitled to receive payment for accrued but unused sick leave.
- 5.31 Sick Leave Abuse. Violation and/or abuse of sick leave privileges will result in disciplinary action. Employees with a pattern of frequent absences for short durations and without reasonable basis may be subject to appropriate disciplinary action. Examples of potential sick leave abuse would be frequent absences following or preceding holidays, reoccurring absences on Fridays and Mondays, etc.
- 5.32 Catastrophic Illness Time Donation: Employees may donate accrued sick leave time for credit to another District employee who suffers a catastrophic illness or injury as determined by the General Manager.

**** Refer to District Policy 2011-03, Catastrophic Illness Time Donation, for policy details.***

SECTION 6.00 - TEMPORARY ASSIGNMENTS

6.01 Assignment to Temporary Work. The General Manager may temporarily assign an employee to perform work normally performed by an employee at a different level of salary.

6.02 Temporary Salary:

- (a) An employee temporarily assigned to perform work of a lower-paid employee shall not have his or her salary reduced.
- (b) An employee temporarily assigned to perform all duties of a higher-paid position shall, for the period of temporary assignment, which shall be no less than 3 consecutive days, have his/her hourly wage increased by five (5) percent.

SECTION 7.00 - EMPLOYEE ORGANIZATION, ADVANCEMENT AND COMPENSATION

- 7.01 Personnel Organization. The District is organized into several departments. Each department includes one or more job titles. Each job title has one or more authorized positions.
- 7.02 Salary Ranges. The District has adopted certain salary ranges for District employees. These ranges may be changed from time to time by District action.
- 7.03 Probationary Period:
- (a) When the General Manager appoints an existing District employee to fill a vacant position, that appointment shall be for a probationary period not to exceed twelve (12) months from the date of the appointment, unless otherwise required by a provision in a Memorandum of Understanding or contract. If the employee fulfills the duties of that position to the District's reasonable satisfaction and otherwise successfully completes the probationary period, the employee shall then become a regular employee in the new position.
 - (b) If during the twelve (12) month probationary period, the employee, appointed to a new position pursuant to Section 7.03 (a), does not perform to the District's reasonable satisfaction or otherwise does not successfully complete the probationary period, that employee shall resume his/her duties in the prior position which he/she held. The General Manager shall then take steps necessary to fill the vacant position.
 - (c) When an employee is working in a new position on a probationary basis pursuant to Section 7.03(a), the General Manager may appoint another District employee ("the other employee") to fill the first employee's position. The other employee shall also serve a probationary period in his/her new position. The other employee shall become a regular employee in the new position contingent upon successful completion of the probationary period and contingent upon the first employee, as referenced in Section 7.03(a), successfully completing his/her probationary period.
- 7.04 Annual Salary Review. Each year the General Manager will review the salary ranges paid by the District and make recommendations to the Board for any necessary changes.
- 7.05 Salary Organization. There shall be a salary range for each authorized position.
- 7.06 Performance Evaluations.
- (a) An employee's supervisor will prepare, in writing, a performance evaluation for each employee.

- (b) Performance evaluations will be prepared in the following instances:
 - (1) When an employee has worked an initial twelve (12) month period in his or her new job position (this applies not only to newly hired employees, but also to employees who have been promoted or otherwise transferred to new job classifications);
 - (2) Annually, for unrepresented employees on the focal review date in April; salary adjustments, if applicable, to be effective May 1st. For represented employees annually on the anniversary of their service date.
 - (3) When an employee is being considered for promotion, transfer, demotion, termination, or other disciplinary action is being considered;
 - (4) Whenever the employee's supervisor believes there has been a significant change in the employee's performance; and
 - (5) Whenever requested by the General Manager or the Board of Directors.
- (c) All performance evaluations become a permanent part of the employee's records. Only the employee involved, the employee's supervisor, the General Manager or his/her designee and the Board may have access to an employee's performance evaluations.
- (d) Upon completion of the performance evaluation, a meeting shall be held between the employee and the supervisor to discuss the employee's performance and to assist in developing the employee's maximum potential within District service.

**** Refer to District Pay for Performance Manual for complete details.***

7.07 Insurance

- (a) Group medical insurance is currently available to all regular Full-Time employees and their eligible spouse, domestic partner and dependents. An employee becomes eligible on the first day of the second calendar month following his or her appointment as a probationary employee.
- (b) Benefits currently provided include group medical, vision, dental and life insurance. Currently, the District will pay an amount established from time to time by the Board.
- (c) The Board may delete or change insurance benefits for employees and/or dependents with or without amending this manual.
- (d) Regular Part-Time and Temporary Employees, and independent contractors shall not receive, nor be entitled to, District-paid health insurance benefits.

- (e) Cafeteria Plan – whereby the employee has the option of opting out of District provided medical benefits for cash, provided that the employee can show proof that they would have dual coverage. The opt-out benefit amount is \$350.00 per month.
- 7.08 Worker's Compensation. Worker's compensation is provided for all employees.
- 7.09 Unemployment Insurance. Unemployment insurance is provided in accordance with current state and federal laws.
- 7.10 Retirement Program:
- (a) The District currently maintains membership in the Public Employees' Retirement System (PERS) for employees qualifying to be covered by this retirement plan. The contributions are specified in the District's contract with PERS or as subsequently amended.
 - (b) For employees not qualifying for memberships in the PERS retirement plan, it is mandatory that these employees participate in a retirement plan, such as a Deferred Compensation Plan, in which the employee makes the contributions. This plan is administered in accordance with the agreement between the District and the plan administrator. Information on the administration and requirements of the plan are available from the personnel administrator.
 - (c) The Board may delete or change retirement benefits with or without amending this manual.
- 7.11 Certification. Licenses and/or other certification required by Federal, State and/or Local Government law or District certification requirements will be specified by the Board and/or General Manager for each job title. Plant Operator classifications shall be limited to Treatment Plant Operator and/or Collection System Operator certificates issued by the State of California or a District-approved educational institution. Plant Operators shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates. Utility Worker classifications shall be limited to Distribution certificates and/or Collection System certificates issued by the State of California or a District-approved educational institution. Utility Workers shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates.
- 7.12 Compensation Schedule and Plan. Unrepresented District employees shall receive the compensation provided in the Pay for Performance Plan. The Board may, at any regular meeting or special meeting duly called for that purpose, modify or change the Pay for Performance Plan.
- 7.13 Salary Plan Administration:
- Salary Plan Administration for all unrepresented employees is provided in the District's Pay for Performance Plan.
- 7.14 Merit Awards. The Board, at its discretion, may by resolution establish a program to pay merit awards to employees for superior and exceptional performance.

- 7.15 Compensation of the General Manager. The General Manager is directly responsible to the Board of Directors for the successful administration of the District's functions. Because of the nature of duties and responsibilities involved, the salary range of this position shall be specially established by the Board, and the Board shall conduct periodic reviews for the salary advancement of this position. Salary advancement shall be at the discretion of the Board.

SECTION 8.00 - EDUCATION AND TRAINING, AND CONFERENCES

- 8.01 Tuition Reimbursement. The General Manager upon consulting the immediate supervisor concerned shall be responsible for proper training and certification of District employees. Upon approval by the General Manager, and budget approval by the Board of Directors, an employee shall be reimbursed for his/her tuition or registration fees and books upon successful completion of the program for which prior approval has been received and which is directly beneficial to the District. The total annual tuition reimbursement allowable per employee shall not exceed \$1500.
- 8.02 Professional Registration, Certification and Licensing. The District will pay fees when such registration, certification and/or licensing is a requirement of the employee's position.
- 8.03 Professional Activities. The District encourages participation in professional societies and committees when these activities are compatible with and an enhancement to District functions. The District will pay reasonable costs of participation in these activities subject to approval by the General Manager and the limitations of the District budget.
- 8.04 Career Development. Successful completion of training courses may be considered in approving salary advancement and making promotions. Evidence of such activity shall be submitted to the District for inclusion in an employee's personnel records.

** Refer to District Policy 2011-01, Continuing Education and Tuition Reimbursement, for complete details.*

SECTION 9.00 - REIMBURSEMENT OF INCURRED EXPENSES

9.01 Reimbursement for Meals:

Travel Meals. The District will reimburse, upon prior authorization, an employee for meals when the employee travels for District business over meal times. The employee must submit detail itemized receipts to the District to initiate reimbursement.

Overtime Meals. The District will reimburse, upon prior authorization, an employee for a meal when the employee is required to perform work for two (2) hours beyond the regular work hours and for an additional meal for each approximately four (4) hours but not more than five (5) hours, insofar as it is possible for the District to do so. The necessary time taken for the meal shall be at District expense. The employee shall submit detail itemized receipts to the District to initiate reimbursement.

9.02 Reimbursement for Mileage. When authorized in advance by the General Manager, an employee directed to utilize his or her personal vehicle in the conduct of District business shall be entitled to reimbursement at the current District mileage allowance rate. The employee must submit an accounting of actual mileage on District business to initiate reimbursement.

9.03 Reimbursement for Lodging. When authorized in advance by the General Manager, an employee who is away from his or her principal residence on District business may be reimbursed for the reasonable cost of overnight accommodations. The employee must submit receipts to initiate reimbursement.

The General Manager at his or her discretion may allow an "advance allowance" to employees when employees are required to attend training seminars or educational programs. The employee must submit all receipts of expenses to substantiate said advance allowance and any funds not utilized must be promptly returned to the District within thirty (30) days.

**** Refer to District Policy 2009-07, Travel and Expense Reimbursement Policy, for complete details.***

SECTION 10.00 - PUBLIC RELATIONS

- 10.01 Public Relations. All employees shall conduct themselves in a manner that will reflect creditably on the District. In dealing with the public, all employees will maintain a polite and helpful attitude.
- 10.02 Grooming & Safety. All employees shall maintain a standard of grooming and safety commensurate with public service. Maintenance personnel shall observe suitable safety precautions when working in situations of unusual potential hazards. Department heads may establish specific grooming and safety standards applicable to the requirements of their operational needs.
- 10.03 Authority to Represent District. No employee shall have any right or authority to make any representation to members of the public or others with whom the District has contracted or is obligated to provide services that the District has legal responsibility for any action, omission or event causing injury, financial loss, damage or inconvenience to any person or property.
- 10.04 Off-Duty Employment. No employee shall accept employment during off-duty hours which may result in a conflict of time or interest, including employment with a party who has a current or pending relationship with the District involving a contract, permit, license, etc.
- 10.05 Acceptance of Gifts. Every District employee is prohibited from soliciting or accepting favors or gifts from the public served by the District, persons seeking to sell goods or services to the District or from other persons or corporations, exceeding in value \$50.00 from any one source in any twelve (12) month period. Acceptance of favors or gifts offered which exceed \$50.00 require prior Board Approval.
- 10.06 Outside Employment.
- District Employment Priority. Full-Time employees may not carry on concurrently with their Rancho Murieta Community Services District employment any private business or undertaking, attention to which affects the time or quality of their work or which tends to discredit the District.
- Outside Employment Approval. Outside work or private business or undertaking of Full-Time employees shall receive the approval of the General Manager prior to the initiation of the outside employment. Any employment which may result in a conflict of time or interest, including employment with a party who has a current or pending relationship with the District involving a contract, permit, license, etc. is prohibited.

SECTION 11.00 - EQUIPMENT, PREMISES AND UNIFORMS

- 11.01 Motor Vehicle Driving Record Requirements. All employees required to drive as part of their job duties must possess a valid California motor vehicle driver's license and possess a driving record commensurate with the District's ability to protect its insurability under its automobile liability policies. Failure to maintain such a record, affecting an employee's ability to operate a vehicle, is cause for disciplinary action and/or termination. The District participates in the Department of Motor Vehicles Employer Pull Notice Program as a means to keep apprised of the driving records of employee's required to drive as part of their job duties.
- 11.02 Business Usage. Rancho Murieta Community Services District vehicles and equipment are to be used for District business. In the event there's an anticipated need to use a District issued vehicle on personal business, the employee will request permission from the General Manager in advance (such approval shall be provided only under mitigating circumstances and on rare occasion).
- 11.03 Incidental Personal Use. Any employee assigned a District vehicle may not use the vehicle for personal purposes, other than for commuting or de minimis personal use (such as a stop for a brief personal errand on the way between a business activity and the employee's home.)
- * Refer to District Policy 2012-05, District Driving Policy, for complete details applicable to Sections 11.01, 11.02 and 11.03.*
- 11.04 Use of Private Vehicle on District Business. In the event there is an anticipated need to use a private vehicle for District business the employee shall be reimbursed at the current District mileage allowance rate.
- * Refer to District Policy 2009-07, Travel and Expense Reimbursement Policy, for complete details applicable to Sections 11.04.*
- 11.05 Safety Equipment. Necessary safety equipment will be purchased and available to all employees of the District who are required to use such equipment on the job. It is the employee's responsibility to utilize, protect and safeguard such equipment from damage. An employee who loses or damages equipment may be required to replace District equipment or to purchase his or her own equipment if, in the opinion of the General Manager, neglect or carelessness on the part of the employee has occurred.
- 11.06 General Use of District Equipment. The District provides vehicles, equipment, tools, supplies and facilities for the use of employees in the performance of their work. Employee use of this equipment for personal reasons is not permitted and is grounds for disciplinary action.
- 11.07 Personal Use of District Premises. Use of District premises for personal use is not permitted except as a member of the public. Written permission is required.

11.08 Uniforms. The District will provide two (2) sets of uniforms per year for each Security Officer. The District contracts with a uniform service for Field Operations employees. Employees are required to wear the uniforms while on duty. District jackets or shirts shall be worn as an outside garment except when the employee is wearing authorized wet weather gear. This display of District uniforms and emblems is to permit identification of employees by the public and to present an appropriate appearance. The employee is responsible for his or her uniforms during employment. Security Officers are responsible for laundering of their uniforms

11.09 Wet Weather Gear. District will provide wet weather gear (raincoat, rain hats, boots, etc.) as may be necessary, up to an amount determined by the District, for employees who are required to work in inclement weather.

**** Refer to District Policy 2010-11, Uniform and Dress Guidelines, for complete details applicable to Sections 11.08 and 11.09.***

11.10 Return of District Equipment. The employee and District agree that upon separation from employment the employee will return all District property on his or her last day of work. Failure to do so shall constitute authorization for the District to take all legal recourse available.

11.11 Smoking Policy. Use of tobacco substances (including but not limited to smoking and chewing tobacco) by District employees is restricted to the employee's scheduled work breaks and lunch time.

Use of tobacco is prohibited within any District facility or District vehicle and any areas where the public may be present, including any and all areas where smoking is restricted by law or postings.

Where the use of tobacco is allowed, the using employee shall be responsible for the appropriate non-hazardous containment and disposal of the tobacco wastes including cigarettes, butts, ashes and chewing tobacco spittle.

**** Refer to District Policy 2011-10, Use of Tobacco Product On District Property, for complete details applicable to Section 11.11.***

SECTION 12.00 - DISCIPLINARY ACTION AND DISMISSAL

The discipline procedures in this section represent guidelines which the District believes are generally appropriate to govern employee conduct. However, they are not absolute rules. The District retains discretion to determine what constitutes proper disciplinary action and procedure in each individual situation.

These guidelines do not grant any employee a specific guarantee that any particular disciplinary decision or procedure will be utilized by the District. As stated in Section 1.08, all employees serve at the will of the District and may be disciplined (up to and including termination) for any reason the District finds sufficient. No property right, right to be disciplined only for "cause", permanent employee status, or procedural right is conferred by this Personnel Manual.

12.01 Initiation of Disciplinary Action or Dismissal. Disciplinary action or dismissal may be initiated by the Board, General Manager on his or her own initiative, or upon written recommendation to the General Manager by the employee's supervisor.

12.02 Nature of Disciplinary Action. Disciplinary action may include written warning, suspension with or without pay, involuntary demotion, reduction in pay or dismissal.

12.03 Grounds for Disciplinary Action or Dismissal. The District reserves the right to dismiss an employee at any time. All District employees are at-will employees who serve at the pleasure of the District. The following list of causes for disciplinary action is included in this manual for illustrative purposes only. The publication of this list does not confer a right to be disciplined only for "cause". The District may discipline an employee for any reason it deems sufficient. Grounds for disciplinary action or dismissal for Full-Time or Part-Time employees include, but are not limited to, the following:

- (a) Fraud, misrepresentation of fact, or concealment when securing initial or continued appointment with the Rancho Murieta Community Services District;
- (b) Unauthorized, unjustified, recurring, or excessive absence;
- (c) Conviction of a felony or other criminal act, which is of a nature to adversely affect the employee's ability to perform the duties and responsibilities of his or her employment;
- (d) Conduct unbecoming to an employee in public service, tending to bring discredit to the District;
- (e) Disorderly or immoral conduct;
- (f) Incapacity due to mental or physical disability when such incapacity so substantially interferes with proper job performance that reasonable accommodation cannot be made;
- (g) Incompetence and/or inefficiency (i.e. failure to adequately perform job assignments);
- (h) Insubordination (i.e. willful failure to follow necessary and reasonable directions of supervisor);

- (i) Possession or consumption of alcoholic beverages during work hours or working while intoxicated;
- (j) Possession or use of narcotics, habit-forming, or any illegal or intoxicating drugs or controlled substances during the business workday (other than use of drugs as specifically prescribed by a licensed physician), or being under the influence while at work;
- (k) Inexcusable neglect of duty;
- (l) Negligence of, willful damage to, waste of, or unauthorized use of District's supplies, equipment or premises;
- (m) Failure to follow safety instructions or directions;
- (n) Employee use of District equipment for personal use;
- (o) Participation by an employee in an unauthorized or illegal strike or work stoppage which affects the District or District operations;
- (p) Any conduct which adversely affects the operation of the District, the health and welfare of District employees or the safety of District property;
- (q) Failure to maintain licenses or certifications required to perform the duties of an assigned position;
- (r) Discourteous treatment of the public or other employees;
- (s) Improper political activity during the business workday or on District premises;
- (t) Willful disobedience of safety rules, regulations, policies, practices, and procedures which indicates a lack of concern for injury to self or others; and
- (u) Willful disregard of District rules, regulations or policies.

12.04 Disciplinary Action :

- (a) Scope of Authority. Any employee may, by written or verbal order, be suspended, involuntarily demoted, reduced in compensation, or dismissed by the General Manager, or designee.

Notice: In all situations involving a disciplinary action or dismissal of a Full-Time who has completed his or her probationary period or Part-Time employee, a notice may be served on the employee either personally or by mail (return receipt requested) at the last known address on file with the District. The notice may include the following:

- (1) The statement of the nature and the proposed effective date of the intended disciplinary action or dismissal;
- (2) A statement of the nature of the causes for action;

- (3) A statement in ordinary and concise language of all specific facts or omissions upon which the causes of the intended action are based;
- (4) A statement that copies of all documents and other materials which support the proposed action are available for examination at the District office; and
- (5) A statement advising the employee of his or her rights to respond orally or in writing to the notice prior to the decision on the intended disciplinary action or dismissal. Any response should be directed to the General Manager and must be made within five (5) calendar days of the date of the notice.

12.05 Suspension Pending Action: Prior to the effective date of any disciplinary action or dismissal, the General Manager, or designee may suspend with or without pay the affected employee if the General Manager, or designee determines such suspension is necessary to protect the health, safety and welfare of the inhabitants and other employees of the District. The rights and benefits provided to an employee so suspended shall not otherwise be affected.

12.06 Review Decision: Prior to a final decision on any intended disciplinary action or dismissal, the General Manager, or designee may consider any written response timely submitted by an employee and may meet with any employee who has timely requested to be orally heard. Such a meeting should take place within five (5) calendar days of the date of the request or on the date mutually agreed upon. The General Manager, or designee shall make a good faith effort to render a decision within ten (10) calendar days of the last day to submit a response, whichever applies. The decision shall be effective the day that it is made and on that day the affected employee may be informed thereof either personally or by mail at his or her last known address on file with the District.

12.07 Effect of Decision:

- (a) When a Full-Time or Part-Time employee is suspended without pay for thirty (30) or fewer calendar days, employee and employer contributions to benefits will be continued. Employee payments for benefits during the period of suspension will be deducted from the last payroll check prior to the date of suspension or the next following payroll check, as may be applicable.
- (b) No benefits will be paid by the District for suspension over thirty (30) calendar days. An employee may continue appropriate benefits by making the payments necessary.

12.08 Effect of Dismissal: Upon the effective date of dismissal, the District shall cease to provide any benefits for the Full-Time or Part-Time employee.

- 12.09 Appeal from Decision. Appeal procedures are established for regular At-Will employees as guidelines for personnel administration, and confer no procedural rights.

A Full-Time or Part-Time employee may appeal a decision to implement an intended disciplinary action or dismissal. The Full-Time or Part-Time employee shall file a Notice of Appeal with the Board within ten (10) business days of the effective date of the decision. The Notice of Appeal shall state the name of the employee, the date and nature of the decision appealed, the name of the person who rendered the decision, and the grounds of the appeal stating all specific facts or omissions upon which the appeal is made. The District shall hold a hearing at which time evidence will be received by the Hearing Officer, no later than sixty (60) days from the date of the appeal, unless otherwise agreed to by the parties. The decision of the General Manager is final.

- 12.10 Failure to File Notice of Appeal. If a Full-Time or Part-Time employee fails to file a Notice of Appeal within the time specified, the disciplinary action or dismissal shall become final without further action.

SECTION 13.00 - LAYOFFS & SEPARATIONS

13.01 Reductions in Workforce; Layoffs:

It is the policy of the District that whenever, in the judgment of the Board of Directors, it becomes necessary to abolish any position of employment, the employee holding such position of employment shall, if no other vacancy within the class exists, be laid off or demoted without disciplinary action and without the right to appeal. A vacancy is one which is not intentionally being held open or unfilled by the District.

13.02 Notification. Employees to be laid off shall be given, whenever possible, at least fourteen (14) calendar days' prior notice.

13.03 Vacancy and Demotion. Except as otherwise provided, whenever there is a reduction in the workforce, the department head shall first demote the employee subject to lay off to a vacancy, if in the same class series or in a lower class for which the employee is qualified. All persons so demoted shall have their names placed on a reemployment list for the class from which they were demoted.

13.04 Employee Rights. An employee affected by layoff shall have the right to displace an employee in the same department who has less seniority in a lower class, in the same class series or in a lower job title in which the affected employee once had regular employee status. For the purpose of this Section and all other purposes, seniority includes all periods of Full-Time service at or above the job title level where layoff is to occur.

13.05 Seniority - Displacement. In order to displace to a former or lower class, an employee must have more seniority than at least one of the incumbents in the lower class and request displacement action in writing to the General Manager within five (5) calendar days of receipt of notice of layoff.

13.06 Salary Upon Layoff Demotion. Employees displaced to a lower class shall be placed at the salary step of the lower class representing the least loss of pay. In no case shall the salary be increased above that received in the class from which the employee was laid off.

13.07 Layoff Order. In each class of positions to be affected by layoff, employees shall be laid off according to employment status in the following order: temporary, probationary, Part-Time and Full-Time regular status.

(a) Temporary and probationary employees shall be laid off according to the needs of the service as determined by the General Manager.

(b) Regular status employees shall be laid off on basis of performance records and qualification.

13.08 Reemployment List. The names of persons laid off shall be carried on reemployment lists for twelve (12) months, except that persons appointed to regular positions of the same level as that which laid off, shall, upon such appointment, be dropped from the list. Persons reemployed in a lower class, or on a temporary basis, shall be continued on the list for the higher position for one (1) year.

13.09 Resignation from Service. An employee electing to leave the District in good standing shall file with the department head a written resignation stating the effective date and reasons for leaving at least two (2) weeks before leaving the service, unless such time limit is waived by the General Manager. Failure to give notice as required by this rule may be cause for denying future employment by the District.

SECTION 14.00 - GRIEVANCES

- 14.01 Purpose of Grievance Procedure. The grievance procedures set forth are designed to resolve grievances informally and to provide an orderly procedure for such resolution. The grievance procedure is available only to regular Full-Time or Part-Time employees.
- 14.02 Policy. Any regular Full-Time or Part-Time employee in the District's employment may make an appointment with their immediate supervisor to discuss his/her work and working conditions, and to discuss any violation, misinterpretation, or inequitable application of these rules and regulations. An employee may present a grievance while on duty, provided such use of on-duty time is kept to a reasonable minimum as determined by the General Manager.
- 14.03 Time Limits. Each person involved in a grievance shall act quickly so that the grievance may be resolved promptly. Each person shall make every effort possible to complete action within the time limits contained within these grievance procedures. But with the written consent of the other parties involved the time limits of any step may be extended.
- 14.04 First Step - Grievance Procedure. This is the informal discussion stage. Within ten (10) calendar days of an event or specific incident giving rise to a grievance, an employee shall seek initial adjustment of the grievance with his/her department head. Should the department head be unable to make a satisfactory adjustment, or be a party to the grievance, the employee may seek adjustment through the General Manager. The employee shall have the decision or response from the department head within five (5) calendar days.
- 14.05 Second Step - Grievance Procedure. This is the formal grievance stage. A written description of the grievance shall be provided to the General Manager. The written description shall include name(s) of grievant(s), date the grievance is initiated, statement of any previous action upon the grievance, a clear statement of the nature of the grievance, a proposed solution to the grievance, and the signature of the grievant(s). The General Manager shall give his/her decision in writing to the grievant(s) within five (5) calendar days after the grievance is filed.
- 14.06 Third Step - Grievance Procedure. Should the General Manager be unable to make a satisfactory adjustment within five (5) calendar days, or be a party to the grievance, the employee may seek adjustment from the Board of Directors within five (5) calendar days of the decision being rendered by the General Manager. If the grievant does not appeal the decision to the Board in writing within five (5) calendar days, the issue will be considered settled. The appeal shall state the date and nature of the grievance, and shall state all specific facts or omissions upon which the appeal is based.
- 14.07 Hearing of Appeal. Within ten (10) calendar days of the filing of an appeal, the Board shall have a meeting with the aggrieved and/or his representative.
- 14.08 Decision on Appeal. Within ten (10) calendar days of the hearing of the appeal, the Board shall issue a written decision concerning the employee's appeal. The decision of the Board of Directors shall be final.
- 14.09 Reports to Board of Directors. The Board of Directors shall receive copies of all formal grievances and all grievance decisions of the General Manager.

14.10 Complaints of Discrimination and Sexual Harassment. If an employee experiences an incident felt to be in violation of the discrimination and/or sexual harassment prohibitions they should report the incident according to Policy 2011-04, Harassment of Any Nature (including Sexual Harassment).

SECTION 15.00 - AFFIRMATIVE ACTION PLAN

- 15.01 General Policy. It shall be the policy of the District to provide equal opportunity in employment for all qualified persons regardless of race, sex, color, religion, national origin, age, sexual preference, ancestry, marital status, pregnancy or physical and mental handicap, and to maintain an affirmative action program of whatever scope is necessary to prevent discrimination. This policy applies to all areas of employment including recruitment, hiring, training, promotion, compensation, benefits, transfer, and social and recreational programs.
- 15.02 Goals. Rancho Murieta Community Services District has adopted an Affirmative Action Program to ensure that personnel decisions are job-related and to further the principle of equal employment opportunity. The District recruits, hires, trains, and promotes qualified persons at all levels of the work force and provides reasonable accommodation to qualified employees and applicants with a known disability who can perform the essential functions of the job.
- 15.03 Designation of Responsible Person. The General Manager is designated as the Affirmative Action Officer for the District. He or she shall be responsible for developing policies and procedures for the District's Affirmative Action Plan and will also be responsible for implementing such policies and procedures.

It is the responsibility of all managers and supervisors to ensure that all personnel actions and programs are administered in accordance with the principle of equality of opportunity and treatment to all.

SECTION 16.00 - DRUG & ALCOHOL ABUSE POLICY

The District has an obligation to its officers, employees and members of the public to take reasonable steps to provide an alcohol and drug free workplace and to deliver services to the public in a safe manner.

No employee shall be under the influence of any substance which impairs safe and productive performance while on District business, or on District property.

** Refer to District Policy 2011-09, Drug and Alcohol Use, for complete details.*

SECTION 17.00 - CONFLICT OF INTEREST

- 17.01 Policy. No employee shall have a direct or indirect interest in District property, property under consideration for purchase by the District, or a contract with the District which violates any laws of the State of California relating to such conflict of interest matters.
- 17.02 Notification Requirements. All notification actions required by the law shall be strictly followed by employees. It shall be the responsibility of employees who may be in potential violation of the statute to familiarize themselves with the provisions and intent of the statute.
- 17.03 Unfair Economic Gain It is the policy of the District that no employee shall be in a position to realize unfair economic gain by virtue of their status with the District.

SECTION 18.00 - INJURY & ILLNESS PREVENTION PROGRAM

- 18.01 Purpose. The District's Injury & Illness Prevention Program is designed to prevent injuries, illnesses, and accidents in the workplace. The primary purpose of this program is to ensure the safety and health of District workers and to provide a safe and healthful work environment. A complete copy of this program is maintained in the Administration Office and is available for each employee's review.
- 18.02 Housekeeping Policy. Good housekeeping is an integral part of any effective program. Keeping work areas neat and clean reduces the chances of accidents and injuries. Well organized work areas also increase the ability of employees to perform their jobs efficiently. Each employee is responsible for keeping their work area neat and orderly. Housekeeping inspections will be conducted in each department on a regular basis.
- 18.03 Responsibility For Safety and Health. All employees of the District are responsible for working safely and maintaining a safe and healthful work environment.
- 18.04 Program Administrator. The Injury and Illness Prevention Program Administrator is the Security Chief. The Administrator is responsible for the overall implementation and maintenance of the District's program.

Rancho Murieta Community Services District
Pay for Performance Manual

Revised: ~~11/17/2011~~

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SECTION 1 - INTRODUCTION

BACKGROUND

In November of 1994, the Board of Directors adopted a policy to develop and implement a compensation plan that would recognize the quality of an employee's performance on the job. Over time, the Pay for Performance Plan has changed to reflect changes in and out of the District, but stayed consistent with the intent of the original agreement. Prior to this time, District employees received pay increases based on the cost of living and length of service. Employees were generally hired at the minimum of the salary range and received a 2.5% increase each year and usually received a cost of living increase ranging from 2 to 3%. Upon reaching the maximum of the salary range, employees received the cost of living increase only. The District did not financially reward employees for their *level* of contribution. This program is based on the assumption that pay can act as a motivator for higher levels of performance. This program applies to non-represented employees. Although the represented employees are covered under the current memorandum of understanding (MOU) between the District and the Operating Engineers Local #3 for minimum standards to move between steps, the basic underpinnings of this manual (i.e. core competencies, measurements, ratings and goal identification and attainment, and performance evaluation) are consistent with those of non-represented employees, supervisors and managers.

SECTION 1-1

GENERAL DESCRIPTION OF THE PAY FOR PERFORMANCE PROGRAM

The Pay for Performance program differs from the old compensation and evaluation programs in a number of ways:

- The pay for each job class is determined by a salary survey of comparable public agencies. This survey is performed no less than every three years. (See Section 2, page 1 for more information)
- No cost of living increases are given, but since a salary survey is conducted regularly, employees are assured of competitive salaries within the financial resources of the District. ~~(Represented employees' increases are subject to the terms and conditions of the MOU.)~~
- Pay increases vary and are based on the employee's level of performance. Pay increases vary from 0 to 8%, based on the employee's performance evaluation and position in the salary range. (See Section 2, page 3, for additional information.) ~~(Represented employees' increases are subject to the terms and conditions of the MOU.)~~
- The evaluation of an employee's performance is based on factors related to the job classification, specifically predetermined competencies and SMART goals and objectives.

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- In addition to base pay, there are additional incentives for specific behaviors such as special service. (See Section 4 for additional information and Policy #2011-08.)
- Benefits are reviewed periodically for their comparability with other agencies, and desirability by employees. (See Section 5 for more information.)

The main components of the program are competitive base pay and benefits, salary increases based on level of performance, and special incentives for unusual achievements. The District, like most public agencies, has limited funds and wants to use those funds in the best possible manner. This program is not intended to punish employees in any way, but rather reward those employees that contribute most to the District's mission of "... to take a leadership role in responding to the needs of the residents. The District will deliver superior community services efficiently and professionally at a reasonable cost while responding to and sustaining the enhanced quality of life the community desires".

The Pay for Performance program is a dynamic program and will be revised when it is apparent that elements of the program are not supporting the objective of rewarding employees for creativity, innovation, teamwork, productivity, and quality. The hope of installing such a program is that the customers of the District will benefit by receiving the highest quality, most cost effective service possible and that employees will be rewarded appropriately for their additional effort.

SECTION 1-2

PURPOSE OF MANUAL

The purpose of this manual is to identify the components of and explain how the pay for performance management program is administered for non-represented employees and the performance management system is administered for all employees, represented and non-represented.

SECTION 2 - COMPENSATION PLAN AND SALARY ADMINISTRATION

SECTION 2-1

STRUCTURE OF SALARY RANGES

External Pay Comparisons

The salary structure for classifications insures external competitiveness through salary comparisons with similar agencies. The District's management team conducts a salary survey no less than every three (3) years. In non survey years, adjustments to the salary ranges based on changes in the CPI will aid in keeping the salary structure competitive with the market. The survey is conducted and completed during the first three (3) months of the calendar year. The Personnel Committee of the Board of Directors reviews the collected data and makes recommendations to the Board for salary range adjustments, if any.

The comparison agencies are selected by the Board of Directors and can be changed at any time. The current survey group is listed below.

Cities and Counties

City of Davis	City of Folsom	City of Galt	City of Modesto
City of Roseville	City of Woodland	City of Yuba City	

Special Districts

Amador Water Agency	Calaveras County Water District
Groveland Community Services District	Mammoth Community Water District
South Tahoe Public Utility District	Tuolumne Utilities District

Security

County of Sacramento	Elk Grove Unified School District
Lake of the Pines Association	Lake Wildwood Association
Sacramento City Unified School District	Sacramento Municipal Utility District

In general, the comparison agencies are cities, counties, and special districts of a similar size, that provide similar services in water and/or wastewater treatment, and security. Other factors, such as geographic region and cost of living, were taken into consideration when choosing the comparator group. The following positions are provided salary ranges as a result of the survey:

Accounting ~~Supervisor~~Manager
Director of Administration
~~District Engineer~~
General Manager
Security Sergeant

Chief Plant Operator
Director of ~~Field~~ Operations
District Secretary
Security ~~Chief~~Supervisor
Utilities Supervisor

Internal Salary Relationships

Not all District classifications are surveyed since some classifications are not common in other agencies or may be part of a series in which certain internal relationships can be inferred. Those classifications not surveyed are linked to the surveyed jobs by percentage differentials. The more similar the linked class is to the benchmark class, the smaller the percentage differential.

At times, pay for a particular class may be altered by internal comparisons even though survey data may indicate a higher or lower salary. The relationship between classes may also change as a result of reorganization of work units or change in employee responsibilities.

Position in the Market

Position in the market refers to “targeted” level of pay among comparison agencies. The Board of Directors determines the District’s position relative to the comparison agencies. The Board may change the District’s position based on such issues as ability to pay, change in District goals, etc. Currently, the District’s position among comparison agencies is the base salary market median of the agencies surveyed.

Salary Ranges

A salary schedule was created for the non-represented classifications, which consists of forty-six (46) salary ranges with approximately 30% between the minimum and maximum. (See Exhibit A.) There shall be no specific or predetermined steps within the range, thus allowing for the flexibility of adjustment to recognize varying levels of performance. Each classification will be assigned to a range. Range placements are made by placing the market base salary median findings for each classification into the salary range whose control point is closest to the market median number. The control point represents the value of each position assigned to the salary range at the fully competent level.

Title	Market Top Step Median	Range Minimum	Control Point (Range NR23)	Range Maximum
Example Position	\$6,300	\$5,293	\$6,351	\$6,986

The maximum pay for each salary range class is 10% above the control point of the range. The minimum of the salary range for each class is 20% below the control point. The range below the control point represents pay for an employee who is not yet fully competent in all aspects of the classification. The following illustrates how the salary range for a class is created.

Position
Control point = \$6,351; Maximum of range = \$6,351 * 1.10; Minimum of range = \$6,351 / 1.20 Resulting Range is \$5,293 - \$6,986

~~Represented employees salary ranges and intermediate steps are identified in the current MOU.~~

SECTION 2-2

INITIAL PAY AND SALARY RANGE ADJUSTMENTS

Pay for New Employees

There are two (2) situations in which new employees may be placed above the entry rate of the salary range: the employee has job related experience and/or training that is greater/more extensive than the minimum requirements for the job and when extensive recruiting indicates that qualified candidates will not accept offers at the entry rate. The District's salary offer to new employees will also take into consideration the extent and level of experience of current employees in the same class to ensure internal equity among employees. This applies to both represented and non-represented employees.

Salary Adjustments

Employees receive salary increases based on their performance during the prior year. The amount of the increase for non-represented employees is based on three factors: the level of performance, current position in the salary range, and money available for salary increases. Salary increases for represented employees are implemented according to the terms and conditions of the current MOU. The following charts depict the possible increases for non-represented employees based on position in the range and overall evaluation of performance.

Performance Standards	% Increases
Exemplary	6.5% - 8% (not to exceed maximum of the range)
Exceeds Standards	3.5% - 6% (not to exceed maximum of the range)
Fully Effective	1 - 3% (not to exceed the control point of the range)
Improvement Needed	0
Minimum Standards Not Met	0

The District has selected the month of April as the focal review date; meaning that all employees will receive annual performance appraisals within the month of April each year. Individuals hired within the first nine (9) months of the rating period (May – January) will be eligible for a pro-rated merit increase, from their hire date forward.

Individuals hired within the last three (3) months of the rating period (February – April) will not receive an annual performance review nor be eligible for a merit increase. Their first performance review will occur on their six (6) month anniversary and they will be eligible for a merit increase on the following Agency-wide annual performance review date.

Once an employee reaches the maximum of the salary range, and is rated as outstanding or exceeds standards, the employee is eligible for the cash equivalent of the recommended increase,

but the increase does not become a part of base pay for purposes of retirement calculations. Employees can only receive a salary adjustment once a year unless they are receiving a promotion to another position.

Adjustments to individual salaries based on range movement are not automatic. ~~(Refer to the current MOU for Represented employees.)~~ The reviewer may recommend an upward adjustment in an individual's salary or may recommend that an individual's salary be maintained at its current level, despite any adjustment in the salary range.

Salary Placement Upon Promotion, Demotion, Reclassification and Market Equity Adjustments

Promotion - When a regular non-represented employee is promoted, the employee will receive a salary increase of at least the minimum of the new salary range. ~~(Refer to the current MOU for Represented employees.)~~

Demotion - When an employee is demoted, the employee's salary will be reduced to an amount in the range of the lower classification which has the same percentage relationship to the control point as the employee's salary in the higher classification. ~~(Refer to the current MOU for Represented employees.)~~

Reclassification - Any employee in a job which is reclassified with a different salary range shall be compensated at the same rate of pay in the new salary range or the minimum of the new salary range should the employee's pay rate be less than the minimum of the new salary range. The salary of an employee whose position is reclassified to a classification with a lower salary range and whose salary is above the maximum of the new salary range shall be frozen at the salary of the old classification until the salary range of the new classification is equal to or exceeds the employee's salary. This is referred to as "Y-rating". ~~(Refer to the current MOU for Represented employees.)~~

Market Equity Adjustments - An employee who is classified in a position with a salary range which has been increased as a result of a salary study (equity adjustment to salary range) remains at their current salary unless adjustment to the salary range results in employees being paid below the minimum of the salary range. If employees are rated as "fully effective" on their previous performance evaluation, they will be given a salary increase that will pay them at the minimum of the salary range. ~~(Refer to the current MOU for Represented employees.)~~

SECTION 3 - PERFORMANCE MANAGEMENT SYSTEM

SECTION 3-1

PURPOSE OF PERFORMANCE MANAGEMENT SYSTEM

The performance management system applies to all employees, represented and non-represented. The objectives of the performance management system are to: encourage effective communication between supervisors and employees regarding expectations for job performance and work habits; provide feedback to employees regarding how well they are meeting those job expectations; assist employees in identifying ways they can achieve the best level of performance; provide a method for tying performance to pay; provide additional opportunities for employees to assist supervisors and managers in identifying ways in which the work environment and productivity can be improved; determine the training needs of employees; and assist employees in planning career goals.

SALARY INCREASE BUDGET

The salary increase budget will be determined annually within the context of overall District's performance and budget dollars available, and shall be fiscally prudent taking into account the District's financial condition, reserves, revenue growth, and competing budget priorities. The range of potential increases for the upcoming rating period will be announced to all employees by April each year. (Refer to the current MOU for Represented employees)

REVIEW PERIODS

The supervisor in the following instances conducts formal reviews of performance:

1. When an employee has worked an initial six (6) month period in his or her new job position (this applies not only to newly hired employees, but also to employees who have been promoted or otherwise transferred to new job classifications);
2. Annually, on the focal review date in April; salary adjustments, if applicable, to be effective May 1st;
3. When an employee is being considered for promotion, transfer, demotion, termination, or other disciplinary action is being considered;
4. Whenever the employee's supervisor believes there has been a significant change in the employee's performance; and
5. Whenever requested by the General Manager or the Board of Directors.

DOCUMENTATION OF THE REVIEW PROCESS

The Performance Evaluation form for the specific individual serves as the record of the review process.

CORE COMPETENCIES

The Core Competencies refer to the interpersonal and job skills common to all classifications and are considered especially important to working successfully at the District. These Core

Competencies describe the expectation of characteristics an employee should possess as they are performing their work at the District. All employees will be evaluated on the first eight (8) competencies listed below. Supervisors and managers will also be evaluated on the last two (2) competencies listed below.

1. **Customer Service** - Represents the District to individuals both inside and outside the organization in a service oriented, responsive, consistent, timely, respectful, and effective manner within the context and authority of their position.
2. **Job Knowledge** - Possesses technical knowledge and learned skills, methods, techniques, policy, and procedures necessary to perform the job. Keeps up-to-date on developments and changes relevant to the job and the District. Understands their job in the context of the District's operations.
3. **Initiative/Innovation** - Self-motivated; resourceful; continually seeks to improve work methods as a means to greater efficiency and effectiveness. Willingness to seek out and accept challenging new responsibilities.
4. **Safety/Security** - Ensures safety of District customers, community, and employees; protects and secures District data, facilities, infrastructure, and systems. (Please note that the rating definition for this Core Competency differs based on functional area, for example, administration, operations, or safety/security.)
5. **Teamwork** - Works collaboratively and cooperatively with others inside and outside of the organization. Creates positive working relationships and fully shares in responsibilities; respects and understands roles within the team. Supports positive working environment to ensure high performance of the whole team and the District.
6. **Reliability** - Monitors status of assignments to meet District fiscal needs, timetables, and deadlines for submission of work; follows instructions and meets job expectations including attendance and punctuality. Accountable and consistent.
7. **Effectiveness/Productivity** - Ability to approach issues effectively, resourcefully, and creatively. Adeptness at analyzing facts, forecasting issues, problem solving, decision-making, and demonstrating good judgment. Ability to use knowledge and skill to deliver a quality product or level of service. Skill at planning, organizing, and prioritizing workload and proficiency in measuring and monitoring workload.
8. **Communication** - Clear and concise in speech, writing, and presentations. Provides required information to individuals both inside and outside the organization in a service oriented, consistent, timely, and effective manner.

9. **Management** - Ensures a smooth operation by maximum utilization of personnel, technology, and equipment; staff motivation, growth, development; and adherence to safety and security guidelines. Provides clear work direction, expectations, and constructive feedback and guidance, including timely performance reviews. Matches program expectations with resources. Identifies and addresses obstacles to their employees' performance.

10. **Leadership** - Uses appropriate interpersonal styles and methods in guiding individuals and groups towards task and strategic accomplishments. Exhibits skills that create a vision of purpose. Influences and manages change. Obtains political support. Encourages communication within and between departments. Establishes, directs, and/or chairs committees, teams, and programs.

RATING OF CORE COMPETENCIES ON THE PERFORMANCE EVALUATION FORM

The rating scale for each core competency consists of five (5) levels – Exemplary, Exceeds Standards, Fully Effective (equivalent to the previous “meets standards” rating), Improvement Needed, and Minimum Standards Not Met. Examples of job behavior are used to describe each level of performance for each competency. It is anticipated that as managers gain more experience with these rating scales, the descriptions of behavior will become more specific. An example scale is shown below for the evaluation competency **Initiative/Innovation**.

EXEMPLARY	EXCEEDS STANDARDS	FULLY EFFECTIVE	IMPROVEMENT NEEDED	MINIMUM STANDARDS NOT MET
A self-starter who always completes work with little or no supervision. Anticipates the needs of others and the District and addresses those needs by taking on increased responsibilities. Thinks out of the box to actively identify and implement creative ways to increase productivity and streamline and improve processes on a District-wide level.	A self-starter who completes work with minimal supervision. Actively seeks increased responsibilities. Thinks out of the box. Recommends ways to increase productivity and streamline and improve processes within department/ program area.	Completes work under general supervision and takes direction well. Takes on additional responsibilities as assigned. Makes some recommendations to increase productivity and streamline and improve processes in assigned program area/area of responsibility.	Requires some direct supervision, difficulty accepting new ideas and responsibilities, and resists change. Attempts may be made to improve work processes in assigned area of responsibility.	Requires constant supervision and is generally not receptive to new ideas and change. Little attempt to improve work processes in assigned area of responsibility.

Each rating has a numerical equivalent: Exemplary = four (4) points, Exceeds Standards = three (3) points, Fully Effective = two (2) points, Improvement Needed = one (1) point, and a rating of

Minimum Standards Not Met receives zero (0) points. Each point equivalent is then multiplied by the weighting for each competency and the resulting weighted scores are added together for the employee's overall rating.

The total weighting for each job must equal, at a minimum, 10 for Supervisors/Managers. The total weighted rating for represented jobs, at the fully functional rating, must equal a minimum 2.0 (-which equates to 100 points from the old evaluation forms). On the next page is an example of rated competencies and the resulting total number of points if an employee had received the given ratings.

The weighting of each competency may vary with each job class. These competencies and the weight of each competency may change over time due to a change in duties and responsibilities or a change in those qualities that the District values or wants to emphasize.

Using the table on the next page, the total points for this sample would equal an overall rating of Fully Effective.

Sample Rating			
Core Competency	Weight	Rating	Weighted Rating
Customer Service	1	3	3
Job Knowledge	1	2	2
Initiative/Innovation	1	2	2
Safety/Security	1	2	2
Teamwork	1	3	3
Reliability	1	3	3
Effectiveness/Productivity	1	2	2
Communication	1	1	1
Management (Supervisors only)	1	3	3
Leadership (Supervisors only)	1	2	2
Total	10		23
Overall Rating			2.3

The total points are calculated based on the total weighted rating divided by the total weight. The District may decide to change the weight on any of the competencies, perhaps to emphasize competencies that will help drive operational goals. For example, if during one year, the District decided to place a greater weight on Teamwork and changed the weight to 5 and kept all other competencies with a weight of 1, then the total weight would equal 14. The overall rating would be calculated based on the total weighted rating divided by 14.

Total points are converted to the Overall Rating using the following scale:

- 3.51 – 4 = Exemplary
- 3 – 3.50 = Exceeds Standards
- 2 – 2.99 = Fully Effective
- 1 – 1.99 = Improvement Needed
- 0 – 0.99 = Minimum Requirements Not Met

EMPLOYEE MERIT INCREASES

A designated supervisor shall be responsible for 1) the annual review of each employee’s performance; and 2) recommendations for employee merit increases. Merit increase recommendations shall be within the District’s annual salary budget guidelines and based on the individual employee’s performance. ~~(Refer to the current MOU for Represented employees.)~~

Guidelines for recommending merit increases. ~~(Refer to the current MOU for Represented employees.):~~

- Range Minimum to the Control Point is the portion of the range where a new or less experienced employee would be placed. Progress through the range would occur as an employee moves towards the fully competent level (control point). There may be circumstances, such as hiring a highly experienced individual, which would warrant salary placement near or at the control point.
- The Control Point is the position of the salary range where an employee may normally expect to progress. Most employees will achieve and maintain a salary at this point of the range (fully competent). The achievement of full competency is determined by the ability to meet standards in the District’s core competencies and achievement of individually determined goals for the review period.
- The Control Point to the Range Maximum is utilized for those employees whose performance over time consistently exceeds expectations or is outstanding as defined by the District’s core competencies and individual goal achievement.

Adjustments to an employee’s salary will be made based on the results of the performance evaluation. Salary adjustments shall be based on achievements in key areas weighted as follows:

- ~~For 2012 reviews~~

Core Competencies	80%
Goals and Objectives	20%
- ~~For 2013 reviews~~

Core Competencies	50%
Goals and Objectives	50%

The maximum total points an employee may receive based on the evaluation of the core competencies and goals and objectives is 4.

Overall rating of achievement of goals and objectives are converted to points using the following scale:

- 4 = Exemplary
- 3 = Exceeds Standards
- 2 = Fully Effective
- 1 = Improvement Needed
- 0 = Minimum Requirements Not Met

During the annual performance review process, both performance ratings (core competencies and goals and objectives) and the relative position of the individual within the salary range will be considered in recommending the salary increase.

The following merit guidelines shall apply for performance reviews: ~~(Refer to the current MOU for Represented employees.):~~

Overall Rating	<Control Point	Control Point	>Control Point and <Max	> Max (lump sum)
Exemplary – 3.51 to 4	6.5% - 8%	6.5% - 8%	6.5% - 8%	6.5%
Exceeds Standards – 3.34 to 3.50	5.5% - 6%	5.5% - 6%	5.5% - 6%	3.5%
Exceeds Standards – 3.17 to 3.33	4.5% - 5%	4.5% - 5%	4.5% - 5%	3.5%
Exceeds Standards – 3 to 3.16	3.5% - 4%	3.5% - 4%	3.5% - 4%	3.5%
Fully Effective – 2 to 2.99	1% - 3%	1% - 3%	0%	0%
Improvement Needed – 1 to 1.99	0%	0%	0%	0%
Min Requirements Not Met– 0 to 0.99	0%	0%	0%	0%

- If base pay is below the control point: Employees with at least “Fully Effective” performance will have the opportunity to receive a pay increase up to the control point of their range, based on their performance. No increase will be given to those rated below “fully effective”.
- If base pay is between the control point and maximum: Employees with performance that either “Exceeds Standards” or is “Exemplary” will have the opportunity to receive an increase up to the maximum of their range. If an “Exemplary” increase exceeds the maximum, the portion above the maximum will be paid in a lump sum payment.
- If base pay is above the maximum: Employees who are frozen at or above the maximum of their range and perform at an “Exemplary” or “Exceeds Standards” level on their performance review, will receive a lump sum payment equal to the applicable percentage on the matrix above.

Timing of Increases. Merit increases will be considered on an annual basis in May, in conjunction with the Agency performance review cycle in April.

EXAMPLES OF PROGRESSION THROUGH SALARY RANGE

This following table demonstrates one example of how a non-represented employee would move through the salary range based on the employment scenario described below. Assume in this example that a salary survey is performed every other year with salary range adjustments effective

the first of July. This means a survey is performed in Years 3, 5, and 7 during the employee’s service. A survey was also performed in Year 1, but prior to the employee’s starting date.

	Hire	End of Year 1	End of Year 2	End of Year 3	End of Year 4	End of Year 5	End of Year 6
Employee Increase		3%	6%	5%	4%	1.6%	4.5%
Employee Salary	\$5,293	\$5,452	\$5,779	\$6,068	\$6,311	\$6,415	\$6,905
Minimum Salary	\$5,293	\$5,293	\$5,293	\$5,346	\$5,346	\$5,346	\$5,346
Control Point	\$6,351	\$6,351	\$6,351	\$6,415	\$6,415	\$6,415	\$6,415
Maximum Salary	\$6,986	\$6,986	\$6,986	\$7,056	\$7,056	\$7,056	\$7,056

In *YEAR 1*, the monthly salary range for this position is \$5,293-\$6,986. The control point of the range is \$6,351. The employee is hired at the range minimum of \$5,293. At the end of *YEAR 1*, the employee receives a “Fully Effective” rating (2.9 Points), qualifying for a maximum increase of 3% to \$5,452.

The employee’s salary *at the beginning of YEAR 2* is \$5,452. At the *end of YEAR 2*, the employee receives an “Exceeds Standards” rating (3.5 Points) and qualifies for a maximum increase of 6%, bringing the employee’s salary to \$5,779.

During YEAR 3, the District performs a salary survey and the Board approves a 1% increase to the salary range for this job based on the results of the survey. The new control point is \$6,415, the range minimum is \$5,346 and the range maximum is \$7,056. *At the end of YEAR 3*, the employee receives another “Exceeds Standards” rating (3.3 Points) and qualifies for maximum increase of 5% at the *end of YEAR 3* increasing salary to \$6,068.

At the end of YEAR 4, the employee receives an “Exceeds Standards” rating (3.1 Points) qualifying for a maximum increase of 4%, which would bring salary to \$6,311.

During YEAR 5, the District performs another salary survey and the Board approves no increase to the salary range for this job based on the results of the survey. The control point, range minimum, and range maximum remain the same. *At the end of YEAR 5*, the employee receives a “Fully Effective” rating (2.9 Points) qualifying for a maximum increase of 3% which would bring salary to \$6,500. However the control point of the range is \$6,415 and when an employee receives a “Fully Effective” rating, they would not be able to move above the control point, therefore the employee’s salary is limited to an increase to the control point or \$6,415.

At the end of YEAR 6, the employee receives a “Fully Effective” rating (2.5 Points) and would remain at the control point, which represents the market median top step. The employee’s salary would remain \$6,415.

This following table demonstrates a second example of how a non-represented employee would move through the salary range based on the employment scenario described below. Assume in this example that a salary survey is performed in Year 1 and every other year (in Years 3, 5, and 7) with salary range adjustments effective the first of July.

	End of Year 1	End of Year 2	End of Year 3	End of Year 4	End of Year 5	End of Year 6
Employee Increase		0%	3.5%	5%	3.7%	6.5% lump sum payment
Employee Salary	\$6,450	\$6,450	\$6,676	\$7,010	\$7,269	\$7,269
Minimum Salary	\$5,293	\$5,293	\$5,399	\$5,399	\$5,507	\$5,507
Control Point	\$6,351	\$6,351	\$6,478	\$6,478	\$6,608	\$6,608
Maximum Salary	\$6,986	\$6,986	\$7,126	\$7,126	\$7,269	\$7,269

In **YEAR 1**, the District performs a salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The monthly salary range for this position is \$5,293-\$6,986. The control point of the range is \$6,351. The employee’s salary is \$6,450.

The employee’s salary *at the beginning of YEAR 2* is \$6,450. At the *end of YEAR 2* the employee receives an “Fully Effective” rating (2.5 Points) and qualifies for no increase because the employee’s salary is above the control point. The employee’s salary would remain \$6,450.

During YEAR 3, the District performs a salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The new control point is \$6,478, the range minimum is \$5,399, and the range maximum is \$7,126. *At the end of YEAR 3*, the employee receives an “Exceeds Standards” rating (3.1 Points) and qualifies for 3.5% increase at the *end of YEAR 3* increasing salary to \$6,676.

At the end of YEAR 4, the employee receives an “Exceeds Standards” rating (3.3 Points) and qualifies for 5% increase at the *end of YEAR 4* increasing salary to \$7,010.

During YEAR 5, the District performs another salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The new control point is \$6,608, the range minimum is \$5,507, and the range maximum is \$7,269. *At the end of YEAR 5* an “Exceeds Standards” rating (3.5 Points) and qualifies for a maximum 6% increase. The largest increase the employee can receive is 3.7% increase to the maximum of the range of \$7,269.

At the end of YEAR 6, the employee receives an “Exemplary” rating (3.9 Points) and qualifies for a maximum 6.5% lump sum payment. The employee’s salary remains the same at \$7,269.

SECTION 3-2

GOALS AND OBJECTIVES

Departmental goals, for both represented and non-represented employees, are based upon District-wide goals identified by the General Manager and the Board of Directors in the Strategic Plan. Department goals become the foundation used by the Supervisor/Manager and his or her staff to establish specific goals for the department/division and employees. Department/Division Heads will review the department/division goals with employees and the overall impact and expectation of that department/division in achieving the goals.

In addition to directing the employee's efforts toward important organizational goals, objectives are a necessary tool for the supervisor as well. Supervisors are responsible for the evaluation process for the purpose of rewarding and developing their employees. The evaluation can be difficult to write and inaccurate in content when a supervisor does not have a clear understanding of what is expected from the employee.

Successful development and negotiation of goals and objectives between the supervisor and employee often result in a more productive workplace. It also allows the employee to understand what is expected of him or her and how he or she will be evaluated at the time of his or her performance appraisal.

Developing Goals

The terms "goal" and "objective" have often been confused with one another and how they are best used. Goals and objectives are defined as follows:

- **Goal:** A broad statement of desired results for the District, department, or division.
- **Objective:** Objectives are determined for each goal. Effective objectives include measurements developed in terms of numbers, percentages, time, or some other tangible indicator of results. They are achievable, challenging, and motivate individuals to attain excellent performance.

Guidelines for Preparing Employee Goals:

- Goals are broad in scope.
- Goals are normally long-term or on-going in nature.
- Goals are based on the goals of the District, but are designed to support areas for which the employee is assigned.
- Goals are brief and clear statements.
- Goals require one or more specific objective to be achieved.
- Goals are within the supervisor's area of responsibility and/or authority.

There are four (4) types of goals:

1. Professional Development Goals focus on career growth. Examples of objectives include attending classes, seminars, or workshops or participating in on-the-job training, cross-training, or self-study programs.
2. Performance Goals focus on the improvement of performance or behavioral problems that impact group or job performance. Examples of objectives include improving computer proficiency, time management, or writing skills; building collaborative co-worker relationships; or reducing absenteeism. (Note: These objectives may reflect Performance Category ratings of “Improvement Needed” or “Minimum Standards Not Met”.)
3. Project Goals are specific assignments. Examples of objectives include participating in or managing an ongoing or future project.
4. Strategy Goals are directly related to the District’s strategy plan.

Developing Objectives

Effective objectives are defined for each major activity, project, or area of responsibility in a position. It is possible, for most positions, to develop measurements in terms of percentages, time, or numbers, or some other objective and quantifiable indicator of results.

Guidelines for Preparing Objectives:

- Objectives are SMART: Specific, Measurable, Attainable, Relevant, and have a Timeframe.
- Objectives are written at an “acceptable level of performance.”
- Objectives are aligned to the supervisor’s goals.
- The number of objectives is typically 2-5, but may vary depending on each employee’s situation.

A good objective is Specific enough so that there is no doubt in either the employee’s or supervisor’s mind as to what is expected.

Measurement methods are objective, not subjective, and they are clear, reasonable, and fair.

A task should be reasonably Attained but challenging, given normal resource availability and management support, rather than just what needs to be done.

An employee cannot reasonably be expected to reach twelve-month objectives in a six-month period. A new employee should not be expected to perform at the same level as an employee with extensive experience.

A Relevant objective is one that has the desired outcome and is in line with department/division objectives and the Strategic Plan of the District.

A good objective encompasses a Time in which each task can be accomplished. A relevant time is selected that also meets the District's timeframe for meeting its goals.

In preparing objectives, each employee, with guidance from his or her supervisor, prepares objectives based on his or her classification description and/or goals of the department/division.

SECTION 3-3

THE PERFORMANCE MANAGEMENT CYCLE

One Month Prior to the Review Period

The supervisor will work with employees to establish goals for the coming year. If employees are new to the job, the supervisor will also review the employee job description with them and ensure that employees understand the duties and responsibilities of the job. The supervisor will explain the expectations in terms of quality of work product, characteristics of work behavior, and level of productivity.

Sixth Month of the Review Period

The supervisor, on an informal basis, will review employees' progress towards goals and other significant work behavior.

Eleventh Month of the Review Period

Employees will be given a copy of the evaluation form and will be required to evaluate their level of performance and provide input into developing goals and objectives for the upcoming review period. This document will be used in discussion with the supervisor during the formal review period.

Twelfth Month of the Review Period

The supervisor will conduct the formal evaluation completing the evaluation form and discuss with the employee the employee's self rating and the supervisor's rating. Goals for the new review period will be set. A follow up meeting is conducted with the employee within the next week to finish discussions after considering information from the initial discussion.

The performance evaluation of any employee receiving an overall rating of "Exemplary" or "Minimum Standards Not Met" will be reviewed by the Management Action Committee (MAC) to ensure consistency in the application of the District's performance standards.

SECTION 3-4

EMPLOYEE APPEAL

Employees not satisfied with the rating of their performance may appeal in writing to the General Manager. The employee may appeal the evaluation process or ratings of particular competency, but not the amount of a salary increase. The review and resulting action by the General Manager is final. ~~(Refer to the current MOU for Represented employees)~~

SECTION 3-5

STEPS IN THE PERFORMANCE REVIEW PROCESS

One (1) month prior to the first supervisor/employee meeting in each series of meetings the supervisor will:

1. Provide a copy of the Performance Evaluation form to the employee for completion.
2. Review the Performance Evaluation form and performance goals established at the most recent previous performance review session.
3. Review notes taken on employee performance since the last formal review.
4. Complete a Performance Evaluation form based on the employee's performance since the last formal review.
5. Develop a preliminary list of goals for the next evaluation period.
6. Schedule a meeting with the employee.
7. Schedule a meeting with the Management Action Committee to review initial rating if the employee's overall rating is "Exemplary" or "Minimum Standards Not Met".

At the performance review meeting the supervisor will:

1. Review the purpose of the performance review.
2. Discuss the employee's past performance, including problems and successes. (Reference goals established at the last performance review, as well as those communicated since the last performance review.)
3. Review reasons for successes and problems, as well as ideas for improvements in employee performance and career growth.
4. Discuss and modify, as needed, goals for the next review period.
5. Schedule a follow-up meeting within a week to finish discussions after considering information from the initial discussion.

At the conclusion of the final meeting:

1. Finalize the Performance Evaluation form.
2. Provide the employee with two copies of the form - one to keep and one to sign and return with comments.
3. Send the original signed Performance Evaluation form, including any employee written comments, to the reviewing manager.

SECTION 3-6

AUDIT OF THE PERFORMANCE MANAGEMENT SYSTEM

The District's ~~Management Action~~Personnel Committee (~~MAC~~) will periodically review the performance management system to ensure that all procedures, evaluation competencies, and evaluation methods are still appropriate in terms of District goals and objectives.

SECTION 4 - ADDITIONAL COMPENSATION INCENTIVES

SECTION 4-1

There are a number of additional rewards and incentives the District may give to employees for special achievements, in addition to merit increases, as part of the annual performance review of goal attainment. These additional compensation incentives are for work “above and beyond” normal work activities and or goal attainment. ~~They are “AttaBoys’ is and are a~~ public recognition of a job well done. Not all incentives are necessarily awarded every year. The cash awards are generally “one-time” awards and are not added to base pay. This section outlines the new types of rewards and general information regarding them. Policy 2011-08 more particularly describes the type of incentives outlined below.

The Board of Directors authorizes the General Manager to budget monies, not to exceed \$150.00 per employee per annum, for the following purposes:

1. Employee job-related achievement or superior performance recognition.
2. Employee recognition event, including awards for employment anniversary dates, recognized at five (5) year increments. Other awards include: certificates of appreciation, special certificates of merit and attendance awards for continuous attendance during any twelve (12) month period ending in the recognition year.
3. Employee retirement.
4. Birth of an employee’s child or other significant milestone in an employee’s life.
5. Bereavement acknowledgements for the death of an employee, an employee’s close family relative or District retiree.
6. Seasonal District celebrations, e.g. December holiday lunch and annual employee appreciation lunch.

Types of expenses authorized under this policy include, but are not limited to, plaques, flowers, cards, refreshments and other minor items.

SAFETY AWARDS

The District recognizes both teams and individuals for promoting safety, maintaining a safe work environment, and working in a safe manner. Both team members and individuals may receive additional time off, lunch, and public recognition in the PIPELINE Newsletter, the RIVER VALLEY TIMES, and public signage.

SPECIAL SERVICE AWARD

This award recognizes outstanding service to the community as indicated by customer acknowledgments. Special service is characterized by:

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- Actions or performance beyond the normal skill level for the job
- Outstanding one-time actions
- Extraordinary effort, diligence, courage, patience or a commitment of the employee's own time to the benefit of the District.

Rewards may consist of additional time off and public recognition in the form of a letter to the employee's family, plaque in offices, and coverage in the PIPELINE Newsletter, RIVER VALLEY TIMES, and on Channel 5 cable television.

COST SAVINGS BONUS

This award is given to employees who conceive of methods, procedures, or services that result in substantial cost savings or efficiencies for the District. Rewards up to a maximum of \$500 (or an amount approved by the Board) can be made to either individuals or groups.

This award is in addition to the Employee Suggestion Program or noteworthy cost savings.

SECTION 4-2

At times, exempt employees are required to work beyond the normal 40 hour workweek. In order to remain competitive within the existing job market, the District allows the following additional compensation pays:

Technology and Equipment stipend: Exempt employees tend to work from home outside of regular work hours. The District allows a \$75 a month stipend to help offset the cost of working outside of the office and incidental expenses incurred while working remotely.

Commuter Stipend: The District acknowledges that exempt employees are required to be in office more than the regular workweek. The District will pay a \$150 a month stipend for all exempt employees to assist with the cost of extended workweeks.

Annual Deferred Compensation Match: Effective July 1 of every fiscal year, each exempt employee will receive a non-PERSable match equal to 2.5% of their annual base salary. The stipend will be placed into a deferred compensation account. Any employee hired after the July 1st date will receive a prorated amount in the fiscal year in which they were hired.

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SECTION 5 - BENEFITS

In addition to base salary, rewards, and incentives, the District provides indirect compensation usually referred to as benefits. Benefits provided by the District are described in detail in the District Personnel Manual.

In an effort to remain competitive in the marketplace, benefit surveys are conducted periodically to compare the District's benefit package to the benefits provided by similar agencies. Adjustments to account for changes in market conditions are made to the District's benefit package, pending Board approval.

The District recognizes that benefits are an extremely important part of total compensation and that employees value them as much as direct compensation. Annually, the District provides each employee with the estimated value of his or her benefits package to ensure each employee recognizes the value of his or her total compensation package.

Rancho Murieta Community Services District
Pay for Performance Manual

Revised:

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SECTION 1 - INTRODUCTION

BACKGROUND

In November of 1994, the Board of Directors adopted a policy to develop and implement a compensation plan that would recognize the quality of an employee's performance on the job. Over time, the Pay for Performance Plan has changed to reflect changes in and out of the District, but stayed consistent with the intent of the original agreement. Prior to this time, District employees received pay increases based on the cost of living and length of service. Employees were generally hired at the minimum of the salary range and received a 2.5% increase each year and usually received a cost of living increase ranging from 2 to 3%. Upon reaching the maximum of the salary range, employees received the cost of living increase only. The District did not financially reward employees for their level of contribution. This program is based on the assumption that pay can act as a motivator for higher levels of performance. This program applies to non-represented employees. Although the represented employees are covered under the current memorandum of understanding (MOU) between the District and the Operating Engineers Local #3 for minimum standards to move between steps, the basic underpinnings of this manual (i.e. core competencies, measurements, ratings and goal identification and attainment, and performance evaluation) are consistent with those of non-represented employees, supervisors and managers.

SECTION 1-1

GENERAL DESCRIPTION OF THE PAY FOR PERFORMANCE PROGRAM

The Pay for Performance program differs from the old compensation and evaluation programs in a number of ways:

- The pay for each job class is determined by a salary survey of comparable public agencies. This survey is performed no less than every three years. (See Section 2, page 1 for more information)
- No cost of living increases are given, but since a salary survey is conducted regularly, employees are assured of competitive salaries within the financial resources of the District.

Pay increases vary and are based on the employee's level of performance. Pay increases vary from 0 to 8%, based on the employee's performance evaluation and position in the salary range. (See Section 2, page 3, for additional information.)

- The evaluation of an employee's performance is based on factors related to the job classification, specifically predetermined competencies and SMART goals and objectives.
- In addition to base pay, there are additional incentives for specific behaviors such as special service. (See Section 4 for additional information and Policy #2011-08.)

- Benefits are reviewed periodically for their comparability with other agencies, and desirability by employees. (See Section 5 for more information.)

The main components of the program are competitive base pay and benefits, salary increases based on level of performance, and special incentives for unusual achievements. The District, like most public agencies, has limited funds and wants to use those funds in the best possible manner. This program is not intended to punish employees in any way, but rather reward those employees that contribute most to the District's mission of "... to take a leadership role in responding to the needs of the residents. The District will deliver superior community services efficiently and professionally at a reasonable cost while responding to and sustaining the enhanced quality of life the community desires".

The Pay for Performance program is a dynamic program and will be revised when it is apparent that elements of the program are not supporting the objective of rewarding employees for creativity, innovation, teamwork, productivity, and quality. The hope of installing such a program is that the customers of the District will benefit by receiving the highest quality, most cost effective service possible and that employees will be rewarded appropriately for their additional effort.

SECTION 1-2

PURPOSE OF MANUAL

The purpose of this manual is to identify the components of and explain how the pay for performance management program is administered for non-represented employees and the performance management system is administered for all employees, represented and non-represented.

SECTION 2 - COMPENSATION PLAN AND SALARY ADMINISTRATION

SECTION 2-1

STRUCTURE OF SALARY RANGES

External Pay Comparisons

The salary structure for classifications insures external competitiveness through salary comparisons with similar agencies. The District's management team conducts a salary survey no less than every three (3) years. In non survey years, adjustments to the salary ranges based on changes in the CPI will aid in keeping the salary structure competitive with the market. The survey is conducted and completed during the first three (3) months of the calendar year. The Personnel Committee of the Board of Directors reviews the collected data and makes recommendations to the Board for salary range adjustments, if any.

The comparison agencies are selected by the Board of Directors and can be changed at any time. The current survey group is listed below.

Cities and Counties

City of Davis	City of Folsom	City of Galt	City of Modesto
City of Roseville	City of Woodland	City of Yuba City	

Special Districts

Amador Water Agency	Calaveras County Water District
Groveland Community Services District	Mammoth Community Water District
South Tahoe Public Utility District	Tuolumne Utilities District

Security

County of Sacramento	Elk Grove Unified School District
Lake of the Pines Association	Lake Wildwood Association
Sacramento City Unified School District	Sacramento Municipal Utility District

In general, the comparison agencies are cities, counties, and special districts of a similar size, that provide similar services in water and/or wastewater treatment, and security. Other factors, such as geographic region and cost of living, were taken into consideration when choosing the comparator group. The following positions are provided salary ranges as a result of the survey:

Accounting Manager	Chief Plant Operator
Director of Administration	Director of Operations
	District Secretary
General Manager	Security Supervisor
Security Sergeant	Utilities Supervisor

Internal Salary Relationships

Not all District classifications are surveyed since some classifications are not common in other agencies or may be part of a series in which certain internal relationships can be inferred. Those classifications not surveyed are linked to the surveyed jobs by percentage differentials. The more similar the linked class is to the benchmark class, the smaller the percentage differential.

At times, pay for a particular class may be altered by internal comparisons even though survey data may indicate a higher or lower salary. The relationship between classes may also change as a result of reorganization of work units or change in employee responsibilities.

Position in the Market

Position in the market refers to “targeted” level of pay among comparison agencies. The Board of Directors determines the District’s position relative to the comparison agencies. The Board may change the District’s position based on such issues as ability to pay, change in District goals, etc. Currently, the District’s position among comparison agencies is the base salary market median of the agencies surveyed.

Salary Ranges

A salary schedule was created for the non-represented classifications, which consists of forty-six (46) salary ranges with approximately 30% between the minimum and maximum. (See Exhibit A.) There shall be no specific or predetermined steps within the range, thus allowing for the flexibility of adjustment to recognize varying levels of performance. Each classification will be assigned to a range. Range placements are made by placing the market base salary median findings for each classification into the salary range whose control point is closest to the market median number. The control point represents the value of each position assigned to the salary range at the fully competent level.

Title	Market Top Step Median	Range Minimum	Control Point (Range NR23)	Range Maximum
Example Position	\$6,300	\$5,293	\$6,351	\$6,986

The maximum pay for each salary range class is 10% above the control point of the range. The minimum of the salary range for each class is 20% below the control point. The range below the control point represents pay for an employee who is not yet fully competent in all aspects of the classification. The following illustrates how the salary range for a class is created.

Position
Control point = \$6,351; Maximum of range = \$6,351 * 1.10; Minimum of range = \$6,351 / 1.20 Resulting Range is \$5,293 - \$6,986

SECTION 2-2

INITIAL PAY AND SALARY RANGE ADJUSTMENTS

Pay for New Employees

There are two (2) situations in which new employees may be placed above the entry rate of the salary range: the employee has job related experience and/or training that is greater/more extensive than the minimum requirements for the job and when extensive recruiting indicates that qualified candidates will not accept offers at the entry rate. The District's salary offer to new employees will also take into consideration the extent and level of experience of current employees in the same class to ensure internal equity among employees. This applies to both represented and non-represented employees.

Salary Adjustments

Employees receive salary increases based on their performance during the prior year. The amount of the increase for non-represented employees is based on three factors: the level of performance, current position in the salary range, and money available for salary increases. Salary increases for represented employees are implemented according to the terms and conditions of the current MOU. The following charts depict the possible increases for non-represented employees based on position in the range and overall evaluation of performance.

Performance Standards	% Increases
Exemplary	6.5% - 8% (not to exceed maximum of the range)
Exceeds Standards	3.5% - 6% (not to exceed maximum of the range)
Fully Effective	1 - 3% (not to exceed the control point of the range)
Improvement Needed	0
Minimum Standards Not Met	0

The District has selected the month of April as the focal review date; meaning that all employees will receive annual performance appraisals within the month of April each year. Individuals hired within the first nine (9) months of the rating period (May – January) will be eligible for a pro-rated merit increase, from their hire date forward.

Individuals hired within the last three (3) months of the rating period (February – April) will not receive an annual performance review nor be eligible for a merit increase. Their first performance review will occur on their six (6) month anniversary and they will be eligible for a merit increase on the following Agency-wide annual performance review date.

Once an employee reaches the maximum of the salary range, and is rated as outstanding or exceeds standards, the employee is eligible for the cash equivalent of the recommended increase, but the increase does not become a part of base pay for purposes of retirement calculations.

Employees can only receive a salary adjustment once a year unless they are receiving a promotion to another position.

Adjustments to individual salaries based on range movement are not automatic. The reviewer may recommend an upward adjustment in an individual's salary or may recommend that an individual's salary be maintained at its current level, despite any adjustment in the salary range.

Salary Placement Upon Promotion, Demotion, Reclassification and Market Equity Adjustments

Promotion - When a regular non-represented employee is promoted, the employee will receive a salary increase of at least the minimum of the new salary range.

Demotion - When an employee is demoted, the employee's salary will be reduced to an amount in the range of the lower classification which has the same percentage relationship to the control point as the employee's salary in the higher classification.

Reclassification - Any employee in a job which is reclassified with a different salary range shall be compensated at the same rate of pay in the new salary range or the minimum of the new salary range should the employee's pay rate be less than the minimum of the new salary range. The salary of an employee whose position is reclassified to a classification with a lower salary range and whose salary is above the maximum of the new salary range shall be frozen at the salary of the old classification until the salary range of the new classification is equal to or exceeds the employee's salary. This is referred to as "Y-rating".

Market Equity Adjustments - An employee who is classified in a position with a salary range which has been increased as a result of a salary study (equity adjustment to salary range) remains at their current salary unless adjustment to the salary range results in employees being paid below the minimum of the salary range. If employees are rated as "fully effective" on their previous performance evaluation, they will be given a salary increase that will pay them at the minimum of the salary range.

SECTION 3 - PERFORMANCE MANAGEMENT SYSTEM

SECTION 3-1

PURPOSE OF PERFORMANCE MANAGEMENT SYSTEM

The performance management system applies to all employees, represented and non-represented. The objectives of the performance management system are to: encourage effective communication between supervisors and employees regarding expectations for job performance and work habits; provide feedback to employees regarding how well they are meeting those job expectations; assist employees in identifying ways they can achieve the best level of performance; provide a method for tying performance to pay; provide additional opportunities for employees to assist supervisors and managers in identifying ways in which the work environment and productivity can be improved; determine the training needs of employees; and assist employees in planning career goals.

SALARY INCREASE BUDGET

The salary increase budget will be determined annually within the context of overall District's performance and budget dollars available, and shall be fiscally prudent taking into account the District's financial condition, reserves, revenue growth, and competing budget priorities. The range of potential increases for the upcoming rating period will be announced to all employees by April each year. (Refer to the current MOU for Represented employees)

REVIEW PERIODS

The supervisor in the following instances conducts formal reviews of performance:

1. When an employee has worked an initial six (6) month period in his or her new job position (this applies not only to newly hired employees, but also to employees who have been promoted or otherwise transferred to new job classifications);
2. Annually, on the focal review date in April; salary adjustments, if applicable, to be effective May 1st;
3. When an employee is being considered for promotion, transfer, demotion, termination, or other disciplinary action is being considered;
4. Whenever the employee's supervisor believes there has been a significant change in the employee's performance; and
5. Whenever requested by the General Manager or the Board of Directors.

DOCUMENTATION OF THE REVIEW PROCESS

The Performance Evaluation form for the specific individual serves as the record of the review process.

CORE COMPETENCIES

The Core Competencies refer to the interpersonal and job skills common to all classifications and are considered especially important to working successfully at the District. These Core

Competencies describe the expectation of characteristics an employee should possess as they are performing their work at the District. All employees will be evaluated on the first eight (8) competencies listed below. Supervisors and managers will also be evaluated on the last two (2) competencies listed below.

1. **Customer Service** - Represents the District to individuals both inside and outside the organization in a service oriented, responsive, consistent, timely, respectful, and effective manner within the context and authority of their position.
2. **Job Knowledge** - Possesses technical knowledge and learned skills, methods, techniques, policy, and procedures necessary to perform the job. Keeps up-to-date on developments and changes relevant to the job and the District. Understands their job in the context of the District's operations.
3. **Initiative/Innovation** - Self-motivated; resourceful; continually seeks to improve work methods as a means to greater efficiency and effectiveness. Willingness to seek out and accept challenging new responsibilities.
4. **Safety/Security** - Ensures safety of District customers, community, and employees; protects and secures District data, facilities, infrastructure, and systems. (Please note that the rating definition for this Core Competency differs based on functional area, for example, administration, operations, or safety/security.)
5. **Teamwork** - Works collaboratively and cooperatively with others inside and outside of the organization. Creates positive working relationships and fully shares in responsibilities; respects and understands roles within the team. Supports positive working environment to ensure high performance of the whole team and the District.
6. **Reliability** - Monitors status of assignments to meet District fiscal needs, timetables, and deadlines for submission of work; follows instructions and meets job expectations including attendance and punctuality. Accountable and consistent.
7. **Effectiveness/Productivity** - Ability to approach issues effectively, resourcefully, and creatively. Adeptness at analyzing facts, forecasting issues, problem solving, decision-making, and demonstrating good judgment. Ability to use knowledge and skill to deliver a quality product or level of service. Skill at planning, organizing, and prioritizing workload and proficiency in measuring and monitoring workload.
8. **Communication** - Clear and concise in speech, writing, and presentations. Provides required information to individuals both inside and outside the organization in a service oriented, consistent, timely, and effective manner.

9. **Management** - Ensures a smooth operation by maximum utilization of personnel, technology, and equipment; staff motivation, growth, development; and adherence to safety and security guidelines. Provides clear work direction, expectations, and constructive feedback and guidance, including timely performance reviews. Matches program expectations with resources. Identifies and addresses obstacles to their employees' performance.
10. **Leadership** - Uses appropriate interpersonal styles and methods in guiding individuals and groups towards task and strategic accomplishments. Exhibits skills that create a vision of purpose. Influences and manages change. Obtains political support. Encourages communication within and between departments. Establishes, directs, and/or chairs committees, teams, and programs.

RATING OF CORE COMPETENCIES ON THE PERFORMANCE EVALUATION FORM

The rating scale for each core competency consists of five (5) levels – Exemplary, Exceeds Standards, Fully Effective (equivalent to the previous “meets standards” rating), Improvement Needed, and Minimum Standards Not Met. Examples of job behavior are used to describe each level of performance for each competency. It is anticipated that as managers gain more experience with these rating scales, the descriptions of behavior will become more specific. An example scale is shown below for the evaluation competency **Initiative/Innovation**.

EXEMPLARY	EXCEEDS STANDARDS	FULLY EFFECTIVE	IMPROVEMENT NEEDED	MINIMUM STANDARDS NOT MET
A self-starter who always completes work with little or no supervision. Anticipates the needs of others and the District and addresses those needs by taking on increased responsibilities. Thinks out of the box to actively identify and implement creative ways to increase productivity and streamline and improve processes on a District-wide level.	A self-starter who completes work with minimal supervision. Actively seeks increased responsibilities. Thinks out of the box. Recommends ways to increase productivity and streamline and improve processes within department/ program area.	Completes work under general supervision and takes direction well. Takes on additional responsibilities as assigned. Makes some recommendations to increase productivity and streamline and improve processes in assigned program area/area of responsibility.	Requires some direct supervision, difficulty accepting new ideas and responsibilities, and resists change. Attempts may be made to improve work processes in assigned area of responsibility.	Requires constant supervision and is generally not receptive to new ideas and change. Little attempt to improve work processes in assigned area of responsibility.

Each rating has a numerical equivalent: Exemplary = four (4) points, Exceeds Standards = three (3) points, Fully Effective = two (2) points, Improvement Needed = one (1) point, and a rating of

Minimum Standards Not Met receives zero (0) points. Each point equivalent is then multiplied by the weighting for each competency and the resulting weighted scores are added together for the employee's overall rating.

The total weighting for each job must equal, at a minimum, 10 for Supervisors/Managers. The total weighted rating for represented jobs, at the fully functional rating, must equal a minimum 2.0 (which equates to 100 points from the old evaluation forms). On the next page is an example of rated competencies and the resulting total number of points if an employee had received the given ratings.

The weighting of each competency may vary with each job class. These competencies and the weight of each competency may change over time due to a change in duties and responsibilities or a change in those qualities that the District values or wants to emphasize.

Using the table on the next page, the total points for this sample would equal an overall rating of Fully Effective.

Sample Rating			
Core Competency	Weight	Rating	Weighted Rating
Customer Service	1	3	3
Job Knowledge	1	2	2
Initiative/Innovation	1	2	2
Safety/Security	1	2	2
Teamwork	1	3	3
Reliability	1	3	3
Effectiveness/Productivity	1	2	2
Communication	1	1	1
Management (Supervisors only)	1	3	3
Leadership (Supervisors only)	1	2	2
Total	10		23
Overall Rating			2.3

The total points are calculated based on the total weighted rating divided by the total weight. The District may decide to change the weight on any of the competencies, perhaps to emphasize competencies that will help drive operational goals. For example, if during one year, the District decided to place a greater weight on Teamwork and changed the weight to 5 and kept all other competencies with a weight of 1, then the total weight would equal 14. The overall rating would be calculated based on the total weighted rating divided by 14.

Total points are converted to the Overall Rating using the following scale:

- 3.51 – 4 = Exemplary
- 3 – 3.50 = Exceeds Standards
- 2 – 2.99 = Fully Effective
- 1 – 1.99 = Improvement Needed
- 0 – 0.99 = Minimum Requirements Not Met

EMPLOYEE MERIT INCREASES

A designated supervisor shall be responsible for 1) the annual review of each employee's performance; and 2) recommendations for employee merit increases. Merit increase recommendations shall be within the District's annual salary budget guidelines and based on the individual employee's performance.

Guidelines for recommending merit increases. :

- Range Minimum to the Control Point is the portion of the range where a new or less experienced employee would be placed. Progress through the range would occur as an employee moves towards the fully competent level (control point). There may be circumstances, such as hiring a highly experienced individual, which would warrant salary placement near or at the control point.
- The Control Point is the position of the salary range where an employee may normally expect to progress. Most employees will achieve and maintain a salary at this point of the range (fully competent). The achievement of full competency is determined by the ability to meet standards in the District's core competencies and achievement of individually determined goals for the review period.
- The Control Point to the Range Maximum is utilized for those employees whose performance over time consistently exceeds expectations or is outstanding as defined by the District's core competencies and individual goal achievement.

Adjustments to an employee's salary will be made based on the results of the performance evaluation. Salary adjustments shall be based on achievements in key areas weighted as follows:

- Core Competencies 50%
- Goals and Objectives 50%

The maximum total points an employee may receive based on the evaluation of the core competencies and goals and objectives is 4.

Overall rating of achievement of goals and objectives are converted to points using the following scale:

- 4 = Exemplary
- 3 = Exceeds Standards
- 2 = Fully Effective
- 1 = Improvement Needed
- 0 = Minimum Requirements Not Met

During the annual performance review process, both performance ratings (core competencies and goals and objectives) and the relative position of the individual within the salary range will be considered in recommending the salary increase.

The following merit guidelines shall apply for performance reviews:

Overall Rating	<Control Point	Control Point	>Control Point and <Max	> Max (lump sum)
Exemplary – 3.51 to 4	6.5% - 8%	6.5% - 8%	6.5% - 8%	6.5%
Exceeds Standards – 3.34 to 3.50	5.5% - 6%	5.5% - 6%	5.5% - 6%	3.5%
Exceeds Standards – 3.17 to 3.33	4.5% - 5%	4.5% - 5%	4.5% - 5%	3.5%
Exceeds Standards – 3 to 3.16	3.5% - 4%	3.5% - 4%	3.5% - 4%	3.5%
Fully Effective – 2 to 2.99	1% - 3%	1% - 3%	0%	0%
Improvement Needed – 1 to 1.99	0%	0%	0%	0%
Min Requirements Not Met– 0 to 0.99	0%	0%	0%	0%

- If base pay is below the control point: Employees with at least “Fully Effective” performance will have the opportunity to receive a pay increase up to the control point of their range, based on their performance. No increase will be given to those rated below “fully effective”.
- If base pay is between the control point and maximum: Employees with performance that either “Exceeds Standards” or is “Exemplary” will have the opportunity to receive an increase up to the maximum of their range. If an “Exemplary” increase exceeds the maximum, the portion above the maximum will be paid in a lump sum payment.
- If base pay is above the maximum: Employees who are frozen at or above the maximum of their range and perform at an “Exemplary” or “Exceeds Standards” level on their performance review, will receive a lump sum payment equal to the applicable percentage on the matrix above.

Timing of Increases. Merit increases will be considered on an annual basis in May, in conjunction with the Agency performance review cycle in April.

EXAMPLES OF PROGRESSION THROUGH SALARY RANGE

This following table demonstrates one example of how a non-represented employee would move through the salary range based on the employment scenario described below. Assume in this example that a salary survey is performed every other year with salary range adjustments effective the first of July. This means a survey is performed in Years 3, 5, and 7 during the employee’s service. A survey was also performed in Year 1, but prior to the employee’s starting date.

	Hire	End of Year 1	End of Year 2	End of Year 3	End of Year 4	End of Year 5	End of Year 6
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Employee Increase		3%	6%	5%	4%	1.6%	4.5%
Employee Salary	\$5,293	\$5,452	\$5,779	\$6,068	\$6,311	\$6,415	\$6,905
Minimum Salary	\$5,293	\$5,293	\$5,293	\$5,346	\$5,346	\$5,346	\$5,346
Control Point	\$6,351	\$6,351	\$6,351	\$6,415	\$6,415	\$6,415	\$6,415
Maximum Salary	\$6,986	\$6,986	\$6,986	\$7,056	\$7,056	\$7,056	\$7,056

In *YEAR 1*, the monthly salary range for this position is \$5,293-\$6,986. The control point of the range is \$6,351. The employee is hired at the range minimum of \$5,293. At the end of *YEAR 1*, the employee receives a “Fully Effective” rating (2.9 Points), qualifying for a maximum increase of 3% to \$5,452.

The employee’s salary *at the beginning of YEAR 2* is \$5,452. At the *end of YEAR 2*, the employee receives an “Exceeds Standards” rating (3.5 Points) and qualifies for a maximum increase of 6%, bringing the employee’s salary to \$5,779.

During YEAR 3, the District performs a salary survey and the Board approves a 1% increase to the salary range for this job based on the results of the survey. The new control point is \$6,415, the range minimum is \$5,346 and the range maximum is \$7,056. *At the end of YEAR 3*, the employee receives another “Exceeds Standards” rating (3.3 Points) and qualifies for maximum increase of 5% at the *end of YEAR 3* increasing salary to \$6,068.

At the end of YEAR 4, the employee receives an “Exceeds Standards” rating (3.1 Points) qualifying for a maximum increase of 4%, which would bring salary to \$6,311.

During YEAR 5, the District performs another salary survey and the Board approves no increase to the salary range for this job based on the results of the survey. The control point, range minimum, and range maximum remain the same. *At the end of YEAR 5*, the employee receives a “Fully Effective” rating (2.9 Points) qualifying for a maximum increase of 3% which would bring salary to \$6,500. However the control point of the range is \$6,415 and when an employee receives a “Fully Effective” rating, they would not be able to move above the control point, therefore the employee’s salary is limited to an increase to the control point or \$6,415.

At the end of YEAR 6, the employee receives a “Fully Effective” rating (2.5 Points) and would remain at the control point, which represents the market median top step. The employee’s salary would remain \$6,415.

This following table demonstrates a second example of how a non-represented employee would move through the salary range based on the employment scenario described below. Assume in this example that a salary survey is performed in Year 1 and every other year (in Years 3, 5, and 7) with salary range adjustments effective the first of July.

	End of Year 1	End of Year 2	End of Year 3	End of Year 4	End of Year 5	End of Year 6
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Employee Increase		0%	3.5%	5%	3.7%	6.5% lump sum payment
Employee Salary	\$6,450	\$6,450	\$6,676	\$7,010	\$7,269	\$7,269
Minimum Salary	\$5,293	\$5,293	\$5,399	\$5,399	\$5,507	\$5,507
Control Point	\$6,351	\$6,351	\$6,478	\$6,478	\$6,608	\$6,608
Maximum Salary	\$6,986	\$6,986	\$7,126	\$7,126	\$7,269	\$7,269

In **YEAR 1**, the District performs a salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The monthly salary range for this position is \$5,293-\$6,986. The control point of the range is \$6,351. The employee's salary is \$6,450.

The employee's salary *at the beginning of YEAR 2* is \$6,450. At the *end of YEAR 2* the employee receives an "Fully Effective" rating (2.5 Points) and qualifies for no increase because the employee's salary is above the control point. The employee's salary would remain \$6,450.

During YEAR 3, the District performs a salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The new control point is \$6,478, the range minimum is \$5,399, and the range maximum is \$7,126. *At the end of YEAR 3*, the employee receives an "Exceeds Standards" rating (3.1 Points) and qualifies for 3.5% increase at the *end of YEAR 3* increasing salary to \$6,676.

At the end of YEAR 4, the employee receives an "Exceeds Standards" rating (3.3 Points) and qualifies for 5% increase at the *end of YEAR 4* increasing salary to \$7,010.

During YEAR 5, the District performs another salary survey and the Board approves a 2% increase to the salary range for this job based on the results of the survey. The new control point is \$6,608, the range minimum is \$5,507, and the range maximum is \$7,269. *At the end of YEAR 5* an "Exceeds Standards" rating (3.5 Points) and qualifies for a maximum 6% increase. The largest increase the employee can receive is 3.7% increase to the maximum of the range of \$7,269.

At the end of YEAR 6, the employee receives an "Exemplary" rating (3.9 Points) and qualifies for a maximum 6.5% lump sum payment. The employee's salary remains the same at \$7,269.

SECTION 3-2

GOALS AND OBJECTIVES

Departmental goals, for both represented and non-represented employees, are based upon District-wide goals identified by the General Manager and the Board of Directors in the Strategic Plan. Department goals become the foundation used by the Supervisor/Manager and his or her staff to establish specific goals for the department/division and employees. Department/Division

Heads will review the department/division goals with employees and the overall impact and expectation of that department/division in achieving the goals.

In addition to directing the employee's efforts toward important organizational goals, objectives are a necessary tool for the supervisor as well. Supervisors are responsible for the evaluation process for the purpose of rewarding and developing their employees. The evaluation can be difficult to write and inaccurate in content when a supervisor does not have a clear understanding of what is expected from the employee.

Successful development and negotiation of goals and objectives between the supervisor and employee often result in a more productive workplace. It also allows the employee to understand what is expected of him or her and how he or she will be evaluated at the time of his or her performance appraisal.

Developing Goals

The terms "goal" and "objective" have often been confused with one another and how they are best used. Goals and objectives are defined as follows:

- Goal: A broad statement of desired results for the District, department, or division.
- Objective: Objectives are determined for each goal. Effective objectives include measurements developed in terms of numbers, percentages, time, or some other tangible indicator of results. They are achievable, challenging, and motivate individuals to attain excellent performance.

Guidelines for Preparing Employee Goals:

- Goals are broad in scope.
- Goals are normally long-term or ongoing in nature.
- Goals are based on the goals of the District, but are designed to support areas for which the employee is assigned.
- Goals are brief and clear statements.
- Goals require one or more specific objective to be achieved.
- Goals are within the supervisor's area of responsibility and/or authority.

There are four (4) types of goals:

1. Professional Development Goals focus on career growth. Examples of objectives include attending classes, seminars, or workshops or participating in on-the-job training, cross-training, or self-study programs.
2. Performance Goals focus on the improvement of performance or behavioral problems that impact group or job performance. Examples of objectives include improving computer proficiency, time management, or writing skills; building

collaborative co-worker relationships; or reducing absenteeism. (Note: These objectives may reflect Performance Category ratings of “Improvement Needed” or “Minimum Standards Not Met”.)

3. Project Goals are specific assignments. Examples of objectives include participating in or managing an ongoing or future project.
4. Strategy Goals are directly related to the District’s strategy plan.

Developing Objectives

Effective objectives are defined for each major activity, project, or area of responsibility in a position. It is possible, for most positions, to develop measurements in terms of percentages, time, or numbers, or some other objective and quantifiable indicator of results.

Guidelines for Preparing Objectives:

- Objectives are SMART: Specific, Measurable, Attainable, Relevant, and have a Timeframe.
- Objectives are written at an “acceptable level of performance.”
- Objectives are aligned to the supervisor’s goals.
- The number of objectives is typically 2-5, but may vary depending on each employee’s situation.

A good objective is Specific enough so that there is no doubt in either the employee’s or supervisor’s mind as to what is expected.

Measurement methods are objective, not subjective, and they are clear, reasonable, and fair.

A task should be reasonably Attained but challenging, given normal resource availability and management support, rather than just what needs to be done.

An employee cannot reasonably be expected to reach twelve-month objectives in a six-month period. A new employee should not be expected to perform at the same level as an employee with extensive experience.

A Relevant objective is one that has the desired outcome and is in line with department/division objectives and the Strategic Plan of the District.

A good objective encompasses a Time in which each task can be accomplished. A relevant time is selected that also meets the District’s timeframe for meeting its goals.

In preparing objectives, each employee, with guidance from his or her supervisor, prepares objectives based on his or her classification description and/or goals of the department/division.

SECTION 3-3

THE PERFORMANCE MANAGEMENT CYCLE

One Month Prior to the Review Period

The supervisor will work with employees to establish goals for the coming year. If employees are new to the job, the supervisor will also review the employee job description with them and ensure that employees understand the duties and responsibilities of the job. The supervisor will explain the expectations in terms of quality of work product, characteristics of work behavior, and level of productivity.

Sixth Month of the Review Period

The supervisor, on an informal basis, will review employees' progress towards goals and other significant work behavior.

Eleventh Month of the Review Period

Employees will be given a copy of the evaluation form and will be required to evaluate their level of performance and provide input into developing goals and objectives for the upcoming review period. This document will be used in discussion with the supervisor during the formal review period.

Twelfth Month of the Review Period

The supervisor will conduct the formal evaluation completing the evaluation form and discuss with the employee the employee's self rating and the supervisor's rating. Goals for the new review period will be set. A follow up meeting is conducted with the employee within the next week to finish discussions after considering information from the initial discussion.

The performance evaluation of any employee receiving an overall rating of "Exemplary" or "Minimum Standards Not Met" will be reviewed by the Management Action Committee (MAC) to ensure consistency in the application of the District's performance standards.

SECTION 3-4

EMPLOYEE APPEAL

Employees not satisfied with the rating of their performance may appeal in writing to the General Manager. The employee may appeal the evaluation process or ratings of particular competency, but not the amount of a salary increase. The review and resulting action by the General Manager is final.

SECTION 3-5

STEPS IN THE PERFORMANCE REVIEW PROCESS

One (1) month prior to the first supervisor/employee meeting in each series of meetings the supervisor will:

1. Provide a copy of the Performance Evaluation form to the employee for completion.

2. Review the Performance Evaluation form and performance goals established at the most recent previous performance review session.
3. Review notes taken on employee performance since the last formal review.
4. Complete a Performance Evaluation form based on the employee's performance since the last formal review.
5. Develop a preliminary list of goals for the next evaluation period.
6. Schedule a meeting with the employee.
7. Schedule a meeting with the Management Action Committee to review initial rating if the employee's overall rating is "Exemplary" or "Minimum Standards Not Met".

At the performance review meeting the supervisor will:

1. Review the purpose of the performance review.
2. Discuss the employee's past performance, including problems and successes. (Reference goals established at the last performance review, as well as those communicated since the last performance review.)
3. Review reasons for successes and problems, as well as ideas for improvements in employee performance and career growth.
4. Discuss and modify, as needed, goals for the next review period.
5. Schedule a follow-up meeting within a week to finish discussions after considering information from the initial discussion.

At the conclusion of the final meeting:

1. Finalize the Performance Evaluation form.
2. Provide the employee with two copies of the form - one to keep and one to sign and return with comments.
3. Send the original signed Performance Evaluation form, including any employee written comments, to the reviewing manager.

SECTION 3-6

AUDIT OF THE PERFORMANCE MANAGEMENT SYSTEM

The District's Personnel Committee will periodically review the performance management system to ensure that all procedures, evaluation competencies, and evaluation methods are still appropriate in terms of District goals and objectives.

SECTION 4 - ADDITIONAL COMPENSATION

SECTION 4-1

There are a number of additional rewards and incentives the District may give to employees for special achievements, in addition to merit increases, as part of the annual performance review of goal attainment. These additional compensation incentives are for work “above and beyond” normal work activities and or goal attainment and are a public recognition of a job well done. Not all incentives are necessarily awarded every year. The cash awards are generally “one-time” awards and are not added to base pay. This section outlines the new types of rewards and general information regarding them. Policy 2011-08 more particularly describes the type of incentives outlined below.

The Board of Directors authorizes the General Manager to budget monies, not to exceed \$150.00 per employee per annum, for the following purposes:

1. Employee job-related achievement or superior performance recognition.
2. Employee recognition event, including awards for employment anniversary dates, recognized at five (5) year increments. Other awards include: certificates of appreciation, special certificates of merit and attendance awards for continuous attendance during any twelve (12) month period ending in the recognition year.
3. Employee retirement.
4. Birth of an employee’s child or other significant milestone in an employee’s life.
5. Bereavement acknowledgements for the death of an employee, an employee’s close family relative or District retiree.
6. Seasonal District celebrations, e.g. December holiday lunch and annual employee appreciation lunch.

Types of expenses authorized under this policy include, but are not limited to, plaques, flowers, cards, refreshments and other minor items.

SAFETY AWARDS

The District recognizes both teams and individuals for promoting safety, maintaining a safe work environment, and working in a safe manner. Both team members and individuals may receive additional time off, lunch, and public recognition in the PIPELINE Newsletter, the RIVER VALLEY TIMES and public signage.

SPECIAL SERVICE AWARD

This award recognizes outstanding service to the community as indicated by customer acknowledgments. Special service is characterized by:

- Actions or performance beyond the normal skill level for the job
- Outstanding one-time actions
- Extraordinary effort, diligence, courage, patience or a commitment of the employee's own time to the benefit of the District.

Rewards may consist of additional time off and public recognition in the form of a letter to the employee's family, plaque in offices, and coverage in the PIPELINE Newsletter, RIVER VALLEY TIMES, and on Channel 5 cable television.

COST SAVINGS BONUS

This award is given to employees who conceive of methods, procedures, or services that result in substantial cost savings or efficiencies for the District. Rewards up to a maximum of \$500 (or an amount approved by the Board) can be made to either individuals or groups.

This award is in addition to the Employee Suggestion Program or noteworthy cost savings.

SECTION 4-2

At times, exempt employees are required to work beyond the normal 40 hour workweek. In order to remain competitive within the existing job market, the District allows the following additional compensation pays:

Technology and Equipment stipend: Exempt employees tend to work from home outside of regular work hours. The District allows a \$75 a month stipend to help offset the cost of working outside of the office and incidental expenses incurred while working remotely.

Commuter Stipend: The District acknowledges that exempt employees are required to be in office more than the regular workweek. The District will pay a \$150 a month stipend for all exempt employees to assist with the cost of extended workweeks.

Annual Deferred Compensation Match: Effective July 1 of every fiscal year, each exempt employee will receive a non-PERSable match equal to 2.5% of their annual base salary. The stipend will be placed into a deferred compensation account. Any employee hired after the July 1st date will receive a prorated amount in the fiscal year in which they were hired.

SECTION 5 - BENEFITS

In addition to base salary, rewards, and incentives, the District provides indirect compensation usually referred to as benefits. Benefits provided by the District are described in detail in the District Personnel Manual.

In an effort to remain competitive in the marketplace, benefit surveys are conducted periodically to compare the District's benefit package to the benefits provided by similar agencies. Adjustments to account for changes in market conditions are made to the District's benefit package, pending Board approval.

The District recognizes that benefits are an extremely important part of total compensation and that employees value them as much as direct compensation. Annually, the District provides each employee with the estimated value of his or her benefits package to ensure each employee recognizes the value of his or her total compensation package.



September 17, 2021

Base Salary Compensation Study Draft Report

Rancho Murieta Community Services District

KOFF & ASSOCIATES

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September 17, 2021

Thomas Hennig
General Manager
Rancho Murieta Community Services District
15160 Jackson Road
Rancho Murieta, CA, 95683

Dear Mr.Hennig:

Koff & Associates is pleased to present the Base Salary Compensation Study Draft Report to the Rancho Murieta Community Services District. This report documents the market compensation survey methodology, findings, and recommendations for implementation.

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

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

Very truly yours,



Katie Kaneko
President



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EXECUTIVE SUMMARY

Background

In August 2021, Koff & Associates (“K&A”) conducted a comprehensive Total Compensation Study for Rancho Murieta Community Services District (RMCS D). All compensation findings and recommendations are presented in this report.

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 RMCS D to recruit and retain a high-quality staff;
- The desire to have a compensation plan that can meet the needs of RMCS D; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across RMCS D.

The goals of the compensation study are to assist RMCS D in developing a competitive pay and benefit plan, which is based upon market data, and to ensure that the plan is fiscally responsible and meets the needs of RMCS D with regards to recruitment and retention of qualified staff.

Summary of Findings

This report summarizes the study methodology, analytical tools, and the total compensation (salary and benefits) survey findings. The results of the total compensation study showed:

- RMCS D’s **base salaries, overall, in comparison to the market median are 3.2% below the market.**
- Historically, including a recent 2020 survey, the District’s **benefits package** does not contribute to its competitive position compared to the market and, therefore, it is recommended that salary decisions should be based on base salary market results versus total compensation; benefit competitiveness should be evaluated separately.
- K&A considers a classification falling within 5% of the median to be competitive.

STUDY PROCESS

Benchmark Classifications

The study included 22 classifications, and of those 17 classifications were selected in order to collect salary and benefits data within the defined labor market. Classifications that we would expect to provide a sufficient sample for analysis were selected as “benchmarks” to use as the basis to build the compensation plan. Benchmark classifications are those classifications that are compared to the market, and these classifications are used as a means of anchoring the RMCS D’s overall compensation plan to the market. Other classifications not surveyed will be included in



the compensation plan and aligned to the benchmark classifications using internal equity principles.

The benchmark classifications are listed in Table 1.

Table 1. Benchmark Classification

Classification Title
1. Accounting Manager
2. Accounting Technician
3. Chief Plant Operator
4. Director of Administration
5. Director of Operations
6. District Engineer
7. District Secretary
8. Equipment Mechanic
9. General Manager
10. Office Technician
11. Plant Operator II
12. Security Gate Officer
13. Security Patrol Officer
14. Security Sergeant
15. Security Supervisor
16. Utilities Supervisor
17. Utility Worker II

Comparator Agencies (Non-Security Classifications)

Another important step in conducting a market salary study is the determination of appropriate agencies for comparison. For this study, K&A updated information for the agencies that RMCS D used in the 2017 and 2020 total compensation study. Previously, agencies were identified for the list of comparator agencies based on the following factors:

- 1. Organizational type and structure** – It is generally recommended that agencies of a similar size and providing similar services to that of RMCS D be used as comparators.



When it comes to technical classes, the size of an organization is not as critical, as these classes perform fairly similar work. The difference in size of an organization becomes more important when comparing classes at the management level. The scope of work and responsibility for management becomes much larger as an organization grows. Factors such as management of a large staff, consequence of error, the political nature of the job, and its visibility all grow with larger organizations. When it is difficult to find agencies that are similarly sized, it is important to get a good balance of smaller and larger agencies.

- 2. Similarity of population, staff, and operational budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
- 3. Scope of services provided** – For the majority of classifications, it is important to select agencies providing similar services. Organizations providing the same services are ideal for comparators and most comparator agencies surveyed provide similar services to RMCS D.
- 4. Labor market and geographic location** – Today’s labor market reality is that many agencies are in competition for the same pool of qualified employees because large portions of the workforce don’t live in the communities they serve, are accustomed to lengthy commutes, and are more likely to consider changing jobs in a larger geographic area than in the past. Furthermore, by selecting employers within a geographic proximity to RMCS D., the resulting labor market data generally reflects the region’s cost of living, housing costs, growth rate, and other demographic characteristics to the same extent as competing employers to RMCS D. Therefore, the geographic labor market area where RMCS D may be recruiting from or losing employees to, was taken into consideration when selecting comparator organizations.

All factors mentioned should be considered in selecting the group of comparator agencies. RMCS D agreed to a list of thirteen (13) agencies.

Table 2. Comparator Agencies (Non-Security Classifications)

Agency
1. Amador Water Agency
2. Calaveras County Water District
3. City of Davis
4. City of Folsom
5. City of Galt
6. City of Modesto



Agency
7. City of Roseville
8. City of Woodland
9. City of Yuba City
10. Groveland Community Services District
11. Mammoth Community Water District
12. South Tahoe Public Utility District
13. Tuolumne Utilities District

Comparator Agencies (Security Classifications)

Table 3. Comparator Agencies (Security Classifications)

Agency
1. Economic Research Institute (ERI)
2. Lake of the Pines Association

The security operations conducted within RMCS D are unique and comparisons could not be found within the core comparator group. We did find close comparability between the security work performed at RMCS D and the work at Lake of the Pines Association, another gated community. To supplement the Lake of the Pines data, we have utilized a national database developed by the Economic Research Institute (ERI). ERI collects public and private sector salary survey data from multiple sources, including market surveys, third-party salary surveys, and public sources to benchmark total compensation. ERI also calculates salary information based on geographical locations. ERI was utilized to obtain regional market information on the Security Gate Officer and the Security Chief. Since ERI encompasses numerous data points in deriving market median data, we could recommend utilizing both Lake of the Pines and ERI to provide sufficient market salary data for security classifications.

Salary Data

For this study, we updated base salary information reflecting the top natural step of the salary range. All figures are presented on a monthly basis.

Data Collection

Data was collected during the months of April and May 2020, through comparator agency websites, conversations with human resources, accounting, and/or finance personnel, and careful review of agency documentation such as classification descriptions, memoranda of understanding, organization charts, and other documents.



Matching Methodology

K&A believes that the data collection step is the most critical for maintaining the overall credibility of any study and relied on RMCS D’s classification descriptions as the foundation for comparison.

When K&A researches and collects data from the comparator agencies to identify possible matches for each of the benchmark classifications, there is an assumption that comparable matches may not be made that are 100% equivalent to the classifications at RMCS D. Therefore, K&A does not match based upon job titles, which can often be misleading, but rather analyze class descriptions before a comparable match is determined.

K&A’s methodology is to analyze each class description and the whole position by evaluating factors such as:

- Definition and typical job functions;
- Distinguishing characteristics;
- Level within a class series (i.e., entry, experienced, journey, specialist, lead, etc.);
- Reporting relationship structure (for example, manages through lower-level staff);
- Education and experience requirements;
- Knowledge, abilities, and skills required to perform the work;
- The scope and complexity of the work;
- Independence of action/responsibility;
- The authority delegated to make decisions and take action;
- The responsibility for the work of others, program administration, and for budget dollars;
- Problem solving/ingenuity;
- Contacts with others (both inside and outside of the organization);
- Consequences of action and decisions; and
- Working conditions.

In order for a match to be included, K&A requires that a classification’s “likeness” be at approximately 70% of the matched classification.

When an appropriate match is not identified for one classification, K&A often uses “hybrids” which can be functional or represent a span in scope of responsibility. A functional hybrid means that the job of one classification at RMCS D is performed by two or more classifications at a comparator agency. A “hybrid” representing a span in scope means that the comparator agency has one class that is “bigger” in scope and responsibility and one class that is “smaller,” where RMCS D’s class falls in the middle.

If an appropriate match could not be found, then no match was reported as a non-comparable (N/C).



Data Spreadsheets

For each benchmark classification, there is a data spreadsheet which lists the matches that were made from each comparator agency.

The average (mean) and median (midpoint) of the comparator agencies are reported as well as the % above or below that RMCS D is compared to the average and median.

The mean is the sum of the comparator agencies’ salaries/total compensation divided by the number of matches. The median is the midpoint of all data with 50% of data points below and 50% of data points above.

In order to calculate the mean and median, K&A requires that there be a minimum of four (4) comparator agencies with matching classifications to the benchmark classification. The reason for requiring a minimum of four matches is so that no one classification has undue influence on the calculations. Sufficient data was collected from the comparator agencies for 15 of the 17 benchmark classifications.

When using survey data to make salary range recommendations and adjustments, K&A recommends using the median, rather than the mean, because the median is not skewed by extremely high or low salary values.

MARKET COMPENSATION FINDINGS

The following table represents a summary of the market top monthly (base) salary findings. For each benchmark classification, the number of matches (agencies with a comparable position) and percent above or below the top monthly salary market median is listed. The table is sorted by top monthly salary in descending order from the most positive percentile (above market) to the most negative (below market).

Table 4. Market Compensation Results Summary

Classification Title	# of Matches	Top Monthly % Above or Below
Security Supervisor	2	11.00%
Accounting Manager	7	8.60%
Equipment Mechanic	12	3.10%
Office Technician	9	1.40%
Security Gate Officer	2	-0.80%
General Manager	13	-3.00%



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Classification Title	# of Matches	Top Monthly % Above or Below
Plant Operator II	13	-3.50%
Director of Operations	13	-4.00%
Accounting Technician	13	-4.80%
Director of Administration	12	-8.30%
Chief Plant Operator	13	-9.10%
Utility Worker II	13	-9.80%
District Secretary	11	-12.20%
Utilities Supervisor	12	-14.00%
Security Patrol Officer	1	Insuff. Data
Security Sergeant	1	Insuff. Data
District Engineer	11	N/A

Base Salary

Base salary market results show that 10 classifications are paid below the market median and six classifications are paid above the market median.

# of Classifications	<5%	5-10%	>10%	Total
Below the Market Median	5	3	2	10
Above the Market Median	2	1	1	4

Generally, a classification falling within 5% of the median is considered to be competitive in the labor market for salary survey purposes because of the differences in compensation policy, actual scope of work, and position requirements. However, RMCS D can adopt a different standard.

INTERNAL SALARY RELATIONSHIPS

Building from the salary levels established for identified benchmark classes, internal salary relationships were developed and consistently applied in order to develop specific salary recommendations for all non-benchmarked classifications.



Base Salary Compensation Study – Draft Report Rancho Murieta Community Services District

In the future, RMCS D may need to utilize internal alignment practices if the number of staff grows and additional classifications are added or classifications change. While analyzing internal relationships, the same factors analyzed when comparing RMCS D’s classifications to the labor market are used when making internal salary alignment recommendations.

In addition, the following are standard human resources practices that are commonly applied when making salary recommendations based upon internal relationships:

- A salary within 5% of the market 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, RMCS D can adopt a closer standard.
- Certain internal percentages are often applied. Those that are the most common are:
 - The differential between a trainee and experienced (or journey) class in a series (I/II or Trainee/Experienced) is generally 10% to 15%;
 - A lead or advanced journey-level (III or Senior-level) class is generally placed 10% to 15% above the journey-level.
 - A full supervisory class is normally placed at least 10% to 25% above the highest level supervised, depending upon the breadth and scope of supervision.
- 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.

Internal equity between certain levels of classifications 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 should be given to these alignments because they represent internal value of classifications within job families, as well as across the organization.

For the purposes of this study, K&A utilized market data to develop the salary recommendations for all of the benchmarked classifications, and used internal equity principles to make the salary recommendations for seven (7) classifications that were not benchmarked. For the non-benchmarked classifications, internal alignments with other classifications will need to be considered, either in the same class series or those classifications that have similar scope of work, level of responsibility, and “worth” to RMCS D. 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 RMCS D management to carefully review these internal relationships and determine if they are still appropriate given the current market data.

It is also important to analyze market data and internal relationships within class series as well as across the organization, and make adjustments to salary range placements, as necessary, based on the needs of the organization.



RMCS D may want to make internal equity adjustments or alignments, as it implements the compensation strategy. This market survey is only a tool to be used by RMCS D to determine market indexing and salary determination.

RECOMMENDATIONS

Pay Philosophy

RMCS D has many options regarding what type of compensation plan it wants to implement. This decision will be based on what RMCS D’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.

Proposed Salary Structure

Currently, RMCS D has three (3) salary structures (Unrepresented, Represented, and Represented Security) with ranges that are approximately 2.5% apart from one another. The salary structure for the Unrepresented group consists of ranges with a minimum, midpoint, and maximum and a range width of approximately 32%. Each salary range in the Represented structure has 6 steps with approximately 4% between each step. Each salary range in the Represented Security structure has 5 steps with approximately 5% between each step. Appendix III contains the current salary range structures.

It is important to note that the salary range structures connect all salary ranges, and their steps, by formula, thereby allowing for COLAs to be applied to only one-dollar figure in the table/matrix, which then automatically updates the entire table. Due to the formula that connects each range to the next (with 2.5% differentials between each range), there is a compounding effect when drawing relationships that span several ranges. For example, with 2.5% differentials between ranges, four ranges should represent a 10% differential. However, because the compounding effect of 2.5%, on top of 2.5%, on top of 2.5%, and so on, the differential between Range 1 and Range 5 is not exactly 10%, but it is slightly greater.

Proposed Salary Range Placements

Appendix IV illustrates the proposed salary range placement for each classification based on the market data as well as the internal relationship analysis. The recommendations are based on base salary market median results. Each benchmark classification was then placed within the proposed salary range in the corresponding salary structure with a top step closest to the Market Placement Salary.

K&A also modified the current internal alignment in certain instances where it seemed warranted based on market-supported groupings and/or compaction issues.



For all classifications, this primary implementation procedure must be completed only at the initial time of implementation. In the future, if RMCS D decides to implement annual across-the-board cost of living adjustment increases, only the salary schedule that was developed and included herein 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.

Options for Implementation

While RMCS D may be interested in bringing all salaries to the market median, in most 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 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 20%) below the market median, a higher percentage change may be initially warranted to reduce the disparity.

For example, if RMCS D decided to implement the recommendations over a three-year period, then the following guidelines could be applied for the initial increase of the three-year implementation plan:

Table 5. Three-Year Implementation Proposal

Market Disparity	% Increase
0 to 4.99%	0 to 2.49%
5.0% to 9.99%	2.5% to 4.99%
10.0% to 14.99%	5.0% to 7.49%
15.0% to 19.99%	7.5% to 9.99%
20.0% and above	10.0%

The initial first year adjustment would provide a portion of the equity increase and place the class into the closest step (but not below) where they are now. Subsequent increases would be spaced on a similar schedule (at annual intervals) based upon the remaining disparity after each adjustment.

Please note that typically, for those classes that had a market disparity of 0 to 4.99%, we recommend a 0% increase in the first year and an adjustment in the second year. Depending upon RMCS D’s financial situation, which will have to be reviewed before each further adjustment is made, all market disparity adjustments are intended to be completed by the third year. RMCS D



may also consider a similar implementation plan over a longer period of time, like a five-year implementation plan.

Another option is to move employees into the salary range that is recommended for each class based on this market study and to the step within the new range that is closest to their current compensation. If employees' current salaries are significantly below market so that their current compensation falls below the bottom of the newly recommended range, then larger adjustments would be needed to move those employees at least to the bottom of the new salary range.

RMCS D 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, RMCS D may want to consider adjusting those classifications' salaries that are currently below the market median as soon as possible, assuming that incumbents' performance meets RMCS D's level of expectation.

When classifications are over market, K&A typically recommends Y-rating employees whose current pay exceeds the maximum of the recommended range until the market numbers "catch up" with their current salary. To Y-rate an employee means to keep the employee's salary frozen and to provide no salary increases (including no cost of living adjustments) until the employee's current salary is within the recommended salary range. This will result in no immediate loss of income, but will delay any future increases until the incumbent's salary is within the salary range.

Other options to "freezing" a classification's salary in place until the market catches up are:

- **"Grandfathering" of salary ranges:** This means that the salary range for the classification is adjusted down to what the market numbers are. However, current incumbents would continue being paid at the current rate of pay (which would put them outside of the new and adjusted salary range for the class) until they separate from employment with RMCS D. Any new-hires would be paid within the newly established salary range.
- **Single-incumbent classes:** If a class only has one incumbent, an option would be to wait until the person separates from employment with RMCS D and then adjust the salary range for the class according to the market.
- **Recent hires:** Some employees who have recently been hired may still be at one of the lower steps within their current salary range. So, even if the top of their current salary range is above market, the incumbents are currently still paid below the market maximum because they are not at the top of their current salary range. In this case, an immediate salary range adjustment could be made to bring the salary range within the market. This would bring the affected incumbents either to the top of the market range or very close to it, but they would not technically be Y-rated or lose any pay.

Another option, of course, is to actually reduce salaries down to the market. However, from an employee relations perspective this may not be a viable option.



USING THE MARKET DATA AS A TOOL

K&A would like to reiterate that this report and the findings are meant to be a tool for RMCS D to create and implement an equitable compensation plan. Compensation strategies are designed to attract and retain excellent staff; however, financial realities and RMCS D’s expectations may also come into play when determining appropriate compensation philosophies and strategies. The collected data presented herein represents a market survey that will give RMCS D an instrument to make future compensation decisions.

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

Respectfully submitted by,
Koff & Associates

A handwritten signature in purple ink, appearing to read 'Katie Kaneko'.

Katie Kaneko
President



Appendix I

Results Summary

Rancho Murieta Community Services District
 Appendix I: Results Summary
 September 2021

Classification	Top Monthly Salary Data					# of Matches
	Top Monthly Salary	Average of Comparators	% above or below	Median of Comparators	% above or below	
Accounting Manager	\$ 11,286	\$ 10,557	6.5%	\$ 10,310	8.6%	7
Accounting Technician	\$ 5,430	\$ 5,607	-3.3%	\$ 5,688	-4.8%	13
Chief Plant Operator	\$ 8,437	\$ 9,525	-12.9%	\$ 9,202	-9.1%	13
Director of Administration	\$ 12,332	\$ 13,160	-6.7%	\$ 13,359	-8.3%	12
Director of Operations	\$ 11,744	\$ 12,394	-5.5%	\$ 12,213	-4.0%	13
District Engineer	proposed	\$ 12,346		\$ 11,665		11
District Secretary	\$ 6,228	\$ 7,372	-18.4%	\$ 6,989	-12.2%	11
Equipment Mechanic	\$ 6,421	\$ 6,430	-0.1%	\$ 6,222	3.1%	12
General Manager	\$ 16,180	\$ 17,287	-6.8%	\$ 16,667	-3.0%	13
Office Technician	\$ 4,107	\$ 4,459	-8.6%	\$ 4,051	1.4%	9
Plant Operator II	\$ 6,356	\$ 6,566	-3.3%	\$ 6,578	-3.5%	13
Security Gate Officer*	\$ 3,138	\$ 3,164	-0.8%	\$ 3,164	-0.8%	2
Security Patrol Officer	\$ 3,956	Insuff. Data	Insuff. Data	Insuff. Data	Insuff. Data	1
Security Sergeant	\$ 6,380	Insuff. Data	Insuff. Data	Insuff. Data	Insuff. Data	1
Security Supervisor*	\$ 8,764	\$ 7,804	11.0%	\$ 7,804	11.0%	2
Utilities Supervisor	\$ 7,571	\$ 8,620	-13.9%	\$ 8,628	-14.0%	12
Utility Worker II	\$ 5,222	\$ 5,642	-8.0%	\$ 5,732	-9.8%	13
		AVERAGE:	-5.1%	AVERAGE:	-3.2%	

* ERI data point



Appendix II

Market Compensation Findings

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Accounting Manager						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	City of Roseville	Accounting Manager	\$ 12,834	7/31/2021	unknown	unknown
2	South Tahoe Public Utility District	Accounting Manager	\$ 12,746	6/24/2021	6/23/2022	2.50%
3	Rancho Murieta Community Services District	Accounting Manager	\$ 11,286	5/20/2021	unknown	unknown
4	City of Davis	Finance Manager	\$ 10,511	7/13/2020	unknown	unknown
5	City of Woodland	Financial Services Manager	\$ 10,310	7/1/2021	1/1/2022	1.00%
6	City of Modesto	Accounting Manager	\$ 9,959	6/22/2021	6/21/2022	2.00%
7	City of Galt	Accounting Manager	\$ 9,086	7/5/2021	unknown	unknown
8	City of Yuba City	Accounting Manager	\$ 8,457	7/31/2021	unknown	unknown
9	Tuolumne Utilities District	N/C				
10	Groveland Community Services District	N/C				
11	Calaveras County Water District	N/C				
12	City of Folsom	N/C				
13	Mammoth Community Water District	N/C				
14	Amador Water Agency	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 10,557
% Rancho Murieta Community Services District Above/Below	6.5%
Median of Comparators	\$ 10,310
% Rancho Murieta Community Services District Above/Below	8.6%
Number of Matches	7

N/C - Non Comparator

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Accounting Technician						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Calaveras County Water District ¹	[Accounting Technician II/ Customer Service Representative II]	\$ 6,894	7/1/2021	unknown	unknown
2	South Tahoe Public Utility District ⁵	[Account Clerk II/ Accounting Technician II]	\$ 6,731	6/24/2021	6/23/2022	2.50%
3	Tuolumne Utilities District	Accounting Assistant	\$ 6,516	6/28/2021	6/27/2022	1.5% - 2.0%
4	Amador Water Agency	Accounting Clerk	\$ 6,451	7/1/2021	unknown	unknown
5	Mammoth Community Water District ⁴	[Account Clerk III/ Account Clerk II]	\$ 6,341	4/1/2021	4/1/2022	3.00%
6	City of Folsom	Accounting Technician II	\$ 6,249	7/1/2021	unknown	unknown
7	City of Roseville	Finance Technician II	\$ 5,688	7/31/2021	unknown	unknown
8	City of Woodland	Accounting Technician	\$ 5,584	7/1/2021	7/1/2022	3.00%
9	Rancho Murieta Community Services District	Accounting Technician	\$ 5,430	1/1/2021	1/1/2022	3.50%
10	Groveland Community Services District	Administrative Services Technician II	\$ 4,696	6/8/2021	unknown	unknown
11	City of Davis	Senior Accounting Assistant	\$ 4,625	7/13/2020	unknown	unknown
12	City of Yuba City ³	[Intermediate Account Clerk/ Senior Account Clerk]	\$ 4,476	7/31/2021	unknown	unknown
13	City of Modesto ²	[Account Clerk II/ Customer Services Account Clerk II]	\$ 4,322	6/22/2021	6/21/2022	2.00%
14	City of Galt	Accounting Assistant II	\$ 4,321	7/5/2021	unknown	unknown

Summary Results	Top Monthly
Average of Comparators	\$ 5,607
% Rancho Murieta Community Services District Above/Below	-3.3%
Median of Comparators	\$ 5,688
% Rancho Murieta Community Services District Above/Below	-4.8%
Number of Matches	13

N/C - Non Comparator

- 1 - Calaveras County Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 2 - City of Modesto: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 3 - City of Yuba City: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 4 - Mammoth Community Water District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 5 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Chief Plant Operator						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Mammoth Community Water District ⁸	[Water Treatment Chief Operator/ Wastewater Treatment Chief Operator]	\$ 11,780	4/1/2021	4/1/2022	3.00%
2	South Tahoe Public Utility District ⁹	Chief Plant Operator	\$ 11,129	6/24/2021	6/23/2022	2.50%
3	City of Roseville ⁵	[Wastewater Treatment Plant Chief Operator/ Water Treatment Plant Chief Operator]	\$ 11,115	7/31/2021	unknown	unknown
4	Calaveras County Water District ²	[Plant Operations Manager/ (Senior Supervisor Water/Wastewater Operations)]	\$ 10,335	7/1/2021	unknown	unknown
5	City of Davis ³	[Wastewater Division Manager/ Water Division Manager]	\$ 9,895	7/13/2020	unknown	unknown
6	City of Folsom	Water Treatment Plant Supervisor	\$ 9,294	1/1/2021	1/1/2022	2.50%
7	Amador Water Agency ¹	[Wastewater Supervisor/ Water Treatment Supervisor]	\$ 9,202	7/1/2021	unknown	unknown
8	City of Modesto	Utilities Plant Operations Supervisor	\$ 8,802	6/22/2021	6/21/2022	2.00%
9	Tuolumne Utilities District ¹⁰	[Wastewater Superintendent/ Water Superintendent/(Wastewater/ Collections Foreman)]	\$ 8,765	6/28/2021	unknown	unknown
10	City of Woodland ⁶	Water Pollution Control Operator IV	\$ 8,709	7/1/2021	7/1/2022	3.00%
11	City of Galt ⁴	[Wastewater Plant Supervisor/ Water System Supervisor]	\$ 8,646	7/5/2021	unknown	unknown
12	City of Yuba City ⁷	[Wastewater Treatment Facility Chief Operator/ Water Treatment Facility Chief Operator]	\$ 8,454	7/31/2021	unknown	unknown
13	Rancho Murieta Community Services District	Chief Plant Operator	\$ 8,437	5/20/2021	unknown	unknown
14	Groveland Community Services District	Chief Plant Operator	\$ 7,695	6/8/2021	unknown	unknown

Summary Results	Top Monthly
Average of Comparators	\$ 9,525
% Rancho Murieta Community Services District Above/Below	-12.9%
Median of Comparators	\$ 9,202
% Rancho Murieta Community Services District Above/Below	-9.1%
Number of Matches	13

N/C - Non Comparator

- 1 - Amador Water Agency: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 2 - Calaveras County Water District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 3 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 4 - City of Galt: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 5 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches. Wastewater Treatment Plant Chief Operator requires Grade V Wastewater Treatment Operator certificate; Water Treatment Plant Chief Operator requires Grade IV Water Treatment Operator certificate; other certifications are not required.
- 6 - City of Woodland: Water Pollution Control Operator IV requires Grade IV Wastewater Treatment Operator certificate only.
- 7 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches. Wastewater Treatment Facility Chief Operator requires Grade IV Wastewater Treatment Plant Operator certificate; Water Treatment Facility Chief Operator requires Grade IV Water Treatment and Grade III Water Distribution certificates.
- 8 - Mammoth Community Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 9 - South Tahoe Public Utility District: The Chief Plant Operator requires a Grade V Wastewater Treatment Plant Operator certificate within 18 months of hire date.
- 10 - Tuolumne Utilities District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches. Wastewater Superintendent requires Grade IV Wastewater Plant Operator certificate; Water Superintendent requires Grade III Water Treatment Operator certificate.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Director of Administration							
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase	
1	South Tahoe Public Utility District ¹⁰	[Chief Financial Officer/ Human Resources Director]	\$ 16,919	6/24/2021	6/23/2022	2.50%	
2	Tuolumne Utilities District ¹¹	[Finance Director/ Administrative Services Director]	\$ 14,009	6/28/2021	unknown	unknown	
3	Mammoth Community Water District ⁹	[Finance Manager/ Human Resources Manager]	\$ 13,917	4/1/2021	4/1/2022	3.00%	
4	City of Roseville ⁵	[Assistant Finance Director/ Assistant Human Resources Director]	\$ 13,749	7/31/2021	unknown	unknown	
5	Calaveras County Water District ²	[Director of Administrative Services/ Human Resources Manager]	\$ 13,468	7/1/2021	unknown	unknown	
6	Amador Water Agency ¹	[Financial Services Manager/ (HR/Risk Management Manager)]	\$ 13,367	7/1/2021	unknown	unknown	
7	City of Modesto ⁵	[Deputy Director of Human Resources/ Director of Human Resources/Deputy Director of Finance/ Director of Finance]	\$ 13,351	6/22/2021	6/21/2022	2.00%	
8	City of Davis ³	[Finance Director/ Human Resources Director]	\$ 13,348	7/13/2020	unknown	unknown	
9	City of Yuba City ⁸	[Director of Finance/ Director of Human Resources/ Human Resources Manager]	\$ 13,155	7/31/2021	unknown	unknown	
10	City of Galt ⁴	[Finance Director/ Human Resources Director]	\$ 12,893	7/5/2021	unknown	unknown	
11	Rancho Murieta Community Services District	Director of Administration	\$ 12,332	5/20/2021	unknown	unknown	
12	City of Woodland ⁷	[Human Resources Manager/ Finance Officer]	\$ 11,665	7/1/2021	1/1/2022	1.00%	
13	Groveland Community Services District	Administrative Services Manager	\$ 8,085	6/8/2021	unknown	unknown	
14	City of Folsom	N/C					

Summary Results	Top Monthly
Average of Comparators	\$ 13,160
% Rancho Murieta Community Services District Above/Below	-6.7%
Median of Comparators	\$ 13,359
% Rancho Murieta Community Services District Above/Below	-8.3%
Number of Matches	12

N/C - Non Comparator

- 1 - Amador Water Agency: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 2 - Calaveras County Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 3 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 4 - City of Galt: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 5 - City of Modesto: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 6 - City of Roseville: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 7 - City of Woodland: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 8 - City of Yuba City: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 9 - Mammoth Community Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 10 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 11 - Tuolumne Utilities District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Director of Operations						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Amador Water Agency	Operations & Engineering Manager	\$ 14,477	7/1/2021	unknown	unknown
2	South Tahoe Public Utility District ⁸	[Manager of Field Operations/ Manager of Plant Operations]	\$ 14,171	6/24/2021	6/23/2022	2.50%
3	City of Roseville ⁴	[Wastewater Utility Manager/ Water Utility Manager]	\$ 14,016	7/31/2021	unknown	unknown
4	Calaveras County Water District	Director of Operations	\$ 13,598	7/1/2021	unknown	unknown
5	Mammoth Community Water District ⁷	[Water & Wastewater Operations Superintendent/ Water & Wastewater Maintenance Superintendent]	\$ 13,250	4/1/2021	4/1/2022	3.00%
6	City of Folsom ²	[Utilities Maintenance Supervisor/ Public Works Director]	\$ 12,564	7/1/2021	unknown	unknown
7	City of Modesto ³	[Water Systems Manager/ Wastewater Collections Systems Manager/ Water Quality Control Plant Manager/ Director of Public Works]	\$ 12,213	6/22/2021	6/21/2022	2.00%
8	Tuolumne Utilities District	Operations Director	\$ 11,785	6/28/2021	unknown	unknown
9	Rancho Murieta Community Services District	Director of Operations	\$ 11,744	5/20/2021	unknown	unknown
10	City of Woodland ⁵	[Water Pollution Control Facility Superintendent/ Public Works Director]	\$ 11,485	7/1/2021	1/1/2022	1.00%
11	City of Davis ¹	[Water Division Manager/ Wastewater Division Manager/ Public Works Director]	\$ 11,269	7/13/2020	unknown	unknown
12	City of Yuba City ⁶	[Public Works Superintendent/ Water Treatment Facility Supervisor/ Wastewater Treatment Facility Supervisor/ Public Works Director-City Engineer]	\$ 11,127	7/31/2021	unknown	unknown
13	City of Galt	Utilities Manager	\$ 11,072	7/5/2021	unknown	unknown
14	Groveland Community Services District	Operations Manager	\$ 10,097	6/8/2021	unknown	unknown

Summary Results		Top Monthly
Average of Comparators		\$ 12,394
% Rancho Murieta Community Services District Above/Below		-5.5%
Median of Comparators		\$ 12,213
% Rancho Murieta Community Services District Above/Below		-4.0%
Number of Matches		13

N/C - Non Comparator

- 1 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 2 - City of Folsom: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 3 - City of Modesto: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 4 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 5 - City of Woodland: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches. Water Pollution Control Facility Superintendent requires Grade V Wastewater Treatment Plant Operator certificate
- 6 - City of Yuba City: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches. Water Treatment Plant Supervisor requires Grade V Water Treatment and Grade III Water Distribution certificates; Wastewater Treatment Facility Supervisor requires a Grade IV Wastewater Treatment certificate.
- 7 - Mammoth Community Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 8 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches. Manager of Plant Operations requires Grade V Wastewater Treatment Operator certificate required within 18 months of appointment.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

District Engineer						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Rancho Murieta Community Services District	District Engineer	Proposed			
2	South Tahoe Public Utility District ¹	[Engineering Department Manager/ Principal Engineer]	\$ 16,133	6/24/2021	6/23/2022	2.50%
3	Mammoth Community Water District	District Engineer	\$ 14,251	4/1/2021	4/1/2022	3.00%
4	Tuolumne Utilities District	District Engineer	\$ 14,009	6/28/2021	unknown	unknown
5	Calaveras County Water District	District Engineer	\$ 13,536	7/1/2021	unknown	unknown
6	City of Roseville	Principal Engineer	\$ 12,459	7/31/2021	unknown	unknown
7	City of Woodland	Principal Civil Engineer	\$ 11,665	7/1/2021	1/1/2022	1.00%
8	City of Davis	Principal Civil Engineer	\$ 11,294	7/13/2020	unknown	unknown
9	City of Folsom	Senior Civil Engineer	\$ 11,048	1/1/2021	1/1/2022	2.50%
10	City of Modesto	Senior Civil Engineer	\$ 10,992	6/22/2021	6/21/2022	2.00%
11	City of Galt	Senior Civil Engineer	\$ 10,538	7/5/2021	unknown	unknown
12	City of Yuba City	Senior Engineer	\$ 9,886	7/31/2021	unknown	unknown
13	Groveland Community Services District	N/C				
14	Amador Water Agency	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 12,346
% Rancho Murieta Community Services District Above/Below	
Median of Comparators	\$ 11,665
% Rancho Murieta Community Services District Above/Below	
Number of Matches	11

N/C - Non Comparator

1 - South Tahoe Public Utility District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

District Secretary						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	South Tahoe Public Utility District	Executive Services Manager	\$ 11,190	6/24/2021	6/23/2022	2.50%
2	City of Roseville ⁴	[Assistant City Clerk/ Executive Assistant]	\$ 8,671	7/31/2021	unknown	unknown
3	City of Davis ¹	[City Clerk/ Executive Assistant]	\$ 8,496	7/13/2020	unknown	unknown
4	Mammoth Community Water District	Executive Assistant	\$ 8,297	4/1/2021	4/1/2022	3.00%
5	Calaveras County Water District	Executive Assistant/Clerk to the Board	\$ 7,180	7/1/2021	unknown	unknown
6	Tuolumne Utilities District	Executive Secretary/Board Clerk	\$ 6,989	6/28/2021	unknown	unknown
7	City of Modesto ³	[Assistant City Clerk/ Executive Assistant to the City Manager]	\$ 6,789	6/22/2021	6/21/2022	2.00%
8	City of Folsom	Administrative Support Specialist	\$ 6,667	7/1/2021	unknown	unknown
9	Rancho Murieta Community Services District	District Secretary	\$ 6,228	5/20/2021	unknown	unknown
10	City of Woodland	Secretary to the City Manager	\$ 5,911	7/1/2021	7/1/2022	3.00%
11	City of Galt ²	[Deputy City Clerk/ Executive Assistant to Administration]	\$ 5,817	7/5/2021	unknown	unknown
12	City of Yuba City ⁵	[Executive Assistant to the City Manager/ Administrative Technician]	\$ 5,088	7/31/2021	unknown	unknown
13	Amador Water Agency	N/C				
14	Groveland Community Services District	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 7,372
% Rancho Murieta Community Services District Above/Below	-18.4%
Median of Comparators	\$ 6,989
% Rancho Murieta Community Services District Above/Below	-12.2%
Number of Matches	11

N/C - Non Comparator

1 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

2 - City of Galt: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

3 - City of Modesto: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

4 - City of Roseville: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

5 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Equipment Mechanic						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	South Tahoe Public Utility District ⁸	[Vehicle & Heavy Equipment Mechanic II/ Maintenance Mechanic Technician II]	\$ 7,282	6/24/2021	6/23/2022	2.50%
2	City of Modesto ⁴	[Equipment Mechanic/ Plant Mechanic II]	\$ 7,259	6/22/2021	6/21/2022	2.00%
3	City of Roseville ⁵	[Mechanic II/ Plant & Equipment Mechanic II]	\$ 7,203	5/8/2021	unknown	unknown
4	Calaveras County Water District	Mechanic II	\$ 7,170	7/1/2021	unknown	unknown
5	City of Woodland ⁶	[Heavy Equipment Mechanic/ Treatment Plant Mechanic]	\$ 6,974	7/1/2021	7/1/2022	3.00%
6	Rancho Murieta Community Services District	Equipment Mechanic	\$ 6,421	1/1/2021	1/1/2022	3.50%
7	City of Folsom ²	[Water Treatment Plant Mechanic/ Mechanic II]	\$ 6,402	7/1/2021	unknown	unknown
8	City of Davis ¹	[Equipment Mechanic II/ WWTP Maintenance Technician II]	\$ 6,042	7/13/2020	unknown	unknown
9	Groveland Community Services District	Maintenance Mechanic II	\$ 6,012	6/8/2021	unknown	unknown
10	Tuolumne Utilities District	Equipment Mechanic II	\$ 5,905	6/28/2021	6/27/2022	1.5% - 2.0%
11	City of Yuba City ⁷	[Mechanic/ Plant Maintenance Mechanic]	\$ 5,736	7/31/2021	unknown	unknown
12	City of Galt ³	[Plant Maintenance Mechanic/ Equipment Mechanic]	\$ 5,670	7/5/2021	unknown	unknown
13	Mammoth Community Water District	Plant Maintenance Worker II	\$ 5,500	4/1/2021	4/1/2022	3.00%
14	Amador Water Agency	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 6,430
% Rancho Murieta Community Services District Above/Below	-0.1%
Median of Comparators	\$ 6,222
% Rancho Murieta Community Services District Above/Below	3.1%
Number of Matches	12

N/C - Non Comparator

- 1 - City of Davis: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 2 - City of Folsom: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 3 - City of Galt: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 4 - City of Modesto: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 5 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 6 - City of Woodland: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 7 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 8 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

General Manager						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	City of Roseville ⁵	[Director of Environmental Utilities/ City Manager]	\$ 22,579	7/31/2021	unknown	unknown
2	South Tahoe Public Utility District	General Manager	\$ 21,354	6/24/2021	6/23/2022	2.50%
3	City of Folsom ²	[City Manager/ Public Works Director]	\$ 18,380	7/1/2021	unknown	unknown
4	Tuolumne Utilities District	General Manager	\$ 17,214	6/28/2021	unknown	unknown
5	City of Modesto ⁴	[Director of Public Works/ Director of Utility Planning & Projects/ City Manager]	\$ 17,017	6/22/2021	6/21/2022	2.00%
6	City of Davis ¹	[Public Works Director/ City Manager]	\$ 16,809	7/13/2020	unknown	unknown
7	Calaveras County Water District	General Manager	\$ 16,667	7/1/2021	unknown	unknown
8	Mammoth Community Water District	General Manager	\$ 16,517	6/1/2021	unknown	3.00%
9	City of Woodland ⁶	[Public Works Director/ City Manager]	\$ 16,333	7/1/2021	unknown	unknown
10	Rancho Murieta Community Services District	General Manager	\$ 16,180	5/20/2021	unknown	unknown
11	City of Yuba City	[Director of Public Works-City Engineer/City Manager]	\$ 16,148	7/31/2021	unknown	unknown
12	Amador Water Agency	General Manager	\$ 15,833	4/16/2020	unknown	unknown
13	City of Galt ³	[City Manager/ Public Works Director]	\$ 15,006	7/5/2021	unknown	unknown
14	Groveland Community Services District	General Manager	\$ 14,872	6/8/2021	unknown	unknown

Summary Results	Top Monthly
Average of Comparators	\$ 17,287
% Rancho Murieta Community Services District Above/Below	-6.8%
Median of Comparators	\$ 16,667
% Rancho Murieta Community Services District Above/Below	-3.0%
Number of Matches	13

N/C - Non Comparator

- 1 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 2 - City of Folsom: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 3 - City of Galt: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 4 - City of Modesto: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 5 - City of Roseville: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 6 - City of Woodland: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Office Technician						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	South Tahoe Public Utility District	Administrative Assistant	\$ 6,535	6/24/2021	6/23/2022	2.50%
2	Amador Water Agency	Administrative Assistant II	\$ 5,619	7/1/2021	unknown	unknown
3	City of Folsom ¹	[Office Assistant/ Senior Office Assistant]	\$ 4,706	7/1/2021	unknown	unknown
4	City of Roseville	Office Assistant II	\$ 4,338	7/31/2021	unknown	unknown
5	Rancho Murieta Community Services District	Office Technician	\$ 4,107	1/1/2021	1/1/2022	3.50%
6	City of Woodland	Administrative Clerk II	\$ 4,051	7/1/2021	7/1/2022	3.00%
7	City of Modesto	Administrative Office Assistant II	\$ 4,014	6/22/2021	6/21/2022	2.00%
8	City of Davis	Office Assistant II	\$ 3,850	7/13/2020	unknown	unknown
9	City of Galt	Office Assistant II	\$ 3,637	7/5/2021	unknown	unknown
10	City of Yuba City	Administrative Clerk II	\$ 3,383	7/31/2021	unknown	unknown
11	Tuolumne Utilities District	N/C				
12	Groveland Community Services District	N/C				
13	Calaveras County Water District	N/C				
14	Mammoth Community Water District	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 4,459
% Rancho Murieta Community Services District Above/Below	-8.6%
Median of Comparators	\$ 4,051
% Rancho Murieta Community Services District Above/Below	1.4%
Number of Matches	9

N/C - Non Comparator

1 - City of Folsom: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Plant Operator II						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	City of Roseville ⁵	[Wastewater Treatment Plant Operator III/ Water Treatment Plant Operator III]	\$ 8,150	7/31/2021	unknown	unknown
2	South Tahoe Public Utility District ⁸	[Operator I/ Operator III/ Pump Station Operator II]	\$ 7,157	6/24/2021	6/23/2022	2.50%
3	City of Woodland ⁶	[Water Pollution Control Operator II/ Water System Operator II]	\$ 7,148	7/1/2021	7/1/2022	3.00%
4	Mammoth Community Water District	Water/Wastewater Operator II	\$ 6,867	4/1/2021	4/1/2022	3.00%
5	City of Folsom	Water Treatment Plant Operator II	\$ 6,722	7/1/2021	unknown	unknown
6	City of Yuba City ⁷	[Water Treatment Plant Operator III/ Wastewater Treatment Facility Operator II]	\$ 6,615	7/31/2021	unknown	unknown
7	City of Modesto ⁴	Utilities Plant Operator II	\$ 6,578	6/22/2021	6/21/2022	2.00%
8	Amador Water Agency ¹	[Plant Operator II/ Wastewater Operator II]	\$ 6,570	7/1/2021	unknown	unknown
9	Calaveras County Water District	Water/Wastewater Treatment Plant Operator II	\$ 6,379	7/1/2021	unknown	unknown
10	Rancho Murieta Community Services District	Plant Operator II	\$ 6,356	1/1/2021	1/1/2022	3.50%
11	City of Davis ²	[Wastewater Treatment Plant Lead Operator/ Water Production System Operator]	\$ 6,344	7/13/2020	unknown	unknown
12	Tuolumne Utilities District ⁹	[Wastewater Operator, Grade 2/ Water Operator, Grade 2]	\$ 5,836	6/28/2021	6/27/2022	1.5% - 2.0%
13	Groveland Community Services District	Water/Wastewater Treatment Operator II	\$ 5,722	6/8/2021	unknown	unknown
14	City of Galt ³	[Wastewater System Operator II/ Water System Operator II]	\$ 5,264	7/5/2021	unknown	unknown

Summary Results	Top Monthly
Average of Comparators	\$ 6,566
% Rancho Murieta Community Services District Above/Below	-3.3%
Median of Comparators	\$ 6,578
% Rancho Murieta Community Services District Above/Below	-3.5%
Number of Matches	13

N/C - Non Comparator

- 1 - Amador Water Agency: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 2 - City of Davis: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 3 - City of Galt: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 4 - City of Modesto: When assigned to water, requires Grade I Water Treatment Operator certificate and Grade III Water Distribution Operator certificate; when assigned to wastewater, requires Grade III Wastewater Treatment Plant Operator certificate.
- 5 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches. Wastewater Treatment Plant Operator III requires Grade III Wastewater Treatment Plant Operator certificate (II-level is entry-level class); Water Treatment Plant Operator III requires Grade III Water Treatment Operator certificate (II-level is entry-level class).
- 6 - City of Woodland: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 7 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 8 - South Tahoe Public Utility District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 9 - Tuolumne Utilities District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Security Gate Officer						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Lake of the Pines Association	Public Safety Officer Gate Officer	\$ 3,447	7/1/2021	unknown	unknown
2	Rancho Murieta Community Services District	Security Gate Officer	\$ 3,138	1/1/2021	1/1/2022	3.50%
3	Economic Research Institute	Security Guard Security Service	\$ 2,881	4/1/2021	unknown	unknown
4	Sacramento Municipal Utility District	N/C				
5	Elk Grove Unified School District	N/C				
6	Sacramento City Unified School District	N/C				
7	South Tahoe Public Utility District	N/C				
8	City of Woodland	N/C				
9	Groveland Community Services District	N/C				
10	Calaveras County Water District	N/C				
11	Tuolumne Utilities District	N/C				
12	City of Yuba City	N/C				
13	Mammoth Community Water District	N/C				
14	Amador Water Agency	N/C				
15	City of Folsom	N/C				
16	City of Davis	N/C				
17	City of Galt	N/C				
18	City of Modesto	N/C				
19	City of Roseville	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 3,164
% Rancho Murieta Community Services District Above/Below	-0.8%
Median of Comparators	\$ 3,164
% Rancho Murieta Community Services District Above/Below	-0.8%
Number of Matches	2

N/C - Non Comparator

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Security Patrol Officer						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Rancho Murieta Community Services District	Security Patrol Officer	\$ 3,956	1/1/2021	1/1/2022	3.50%
2	Lake of the Pines Association	Public Safety Officer II	\$ 3,560	7/1/2021	unknown	unknown
3	South Tahoe Public Utility District	N/C				
4	City of Woodland	N/C				
5	Groveland Community Services District	N/C				
6	Calaveras County Water District	N/C				
7	Tuolumne Utilities District	N/C				
8	City of Yuba City	N/C				
9	Mammoth Community Water District	N/C				
10	Amador Water Agency	N/C				
11	City of Folsom	N/C				
12	City of Davis	N/C				
13	City of Galt	N/C				
14	City of Modesto	N/C				
15	City of Roseville	N/C				
16	Economic Research Institute	N/C				

Summary Results	Top Monthly
Average of Comparators	Insuff. Data
% Rancho Murieta Community Services District Above/Below	Insuff. Data
Median of Comparators	Insuff. Data
% Rancho Murieta Community Services District Above/Below	Insuff. Data
Number of Matches	1

N/C - Non Comparator

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Security Sergeant						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Rancho Murieta Community Services District	Security Sergeant	\$ 6,380	5/20/2021	unknown	unknown
2	Lake of the Pines Association	Public Safety Officer III	\$ 4,437	7/1/2021	unknown	unknown
3	South Tahoe Public Utility District	N/C				
4	City of Woodland	N/C				
5	Groveland Community Services District	N/C				
6	Calaveras County Water District	N/C				
7	Tuolumne Utilities District	N/C				
8	City of Yuba City	N/C				
9	Mammoth Community Water District	N/C				
10	Amador Water Agency	N/C				
11	City of Folsom	N/C				
12	City of Davis	N/C				
13	City of Galt	N/C				
14	City of Modesto	N/C				
15	City of Roseville	N/C				

Summary Results	Top Monthly
Average of Comparators	Insuff. Data
% Rancho Murieta Community Services District Above/Below	Insuff. Data
Median of Comparators	Insuff. Data
% Rancho Murieta Community Services District Above/Below	Insuff. Data
Number of Matches	1

N/C - Non Comparator

1 - Elk Grove Unified School District: The Safety and Security Manager requires a P.O.S.T Basic certificate within 24 months of hire.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Security Supervisor						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Economic Research Institute Data	Security Manager	\$ 8,917	4/1/2021	unknown	unknown
2	Rancho Murieta Community Services District	Security Supervisor	\$ 8,764	5/20/2021	unknown	unknown
3	Lake of the Pines Association	Public Safety Manager	\$ 6,691	7/1/2021	unknown	unknown
4	South Tahoe Public Utility District	N/C				
5	City of Woodland	N/C				
6	Groveland Community Services District	N/C				
7	Calaveras County Water District	N/C				
8	Tuolumne Utilities District	N/C				
9	City of Yuba City	N/C				
10	Mammoth Community Water District	N/C				
11	Amador Water Agency	N/C				
12	City of Folsom	N/C				
13	City of Davis	N/C				
14	City of Galt	N/C				
15	City of Modesto	N/C				
16	City of Roseville	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 7,804
% Rancho Murieta Community Services District Above/Below	11.0%
Median of Comparators	\$ 7,804
% Rancho Murieta Community Services District Above/Below	11.0%
Number of Matches	2

N/C - Non Comparator

1 - Elk Grove Unified School District: The Assistant Director of Safety & Security requires a P.O.S.T Basic certificate and firearms qualifications.

2 - Sacramento City Unified School District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Utilities Supervisor						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Mammoth Community Water District ⁷	Line Maintenance Supervisor	\$ 10,696	4/1/2021	4/1/2022	3.00%
2	Calaveras County Water District ¹	[(Distribution/ Collections Manager)/ Senior Supervisor, Distribution and Collections]	\$ 10,056	7/1/2021	unknown	unknown
3	South Tahoe Public Utility District ⁸	[Underground Sewer Repair Supervisor/ Underground Water Repair Supervisor]	\$ 9,884	6/24/2021	6/23/2022	2.50%
4	City of Folsom	Utilities Maintenance Supervisor	\$ 9,294	1/1/2021	1/1/2022	2.50%
5	Amador Water Agency	Distribution/Canal Supervisor	\$ 9,202	7/1/2021	unknown	unknown
6	City of Modesto ³	Utilities Services Supervisor	\$ 8,802	6/22/2021	6/21/2022	2.00%
7	City of Yuba City ⁶	[Water Distribution Supervisor/ Wastewater Collections Supervisor]	\$ 8,454	7/31/2021	unknown	unknown
8	City of Roseville ⁴	[Wastewater Collection Supervisor/ Water Distribution Supervisor]	\$ 8,421	7/31/2021	unknown	unknown
9	City of Woodland ⁵	[Utilities Maintenance Supervisor/ Infrastructure Operations & Maintenance Superintendent]	\$ 8,072	7/1/2021	1/1/2022	1.00%
10	Rancho Murieta Community Services District	Utilities Supervisor	\$ 7,571	5/20/2021	unknown	unknown
11	Tuolumne Utilities District ⁹	Construction/Maintenance Superintendent	\$ 7,192	6/28/2021	unknown	unknown
12	City of Davis ²	[Water Production System Supervisor/ Collection System Supervisor]	\$ 6,948	7/13/2020	unknown	unknown
13	City of Galt	Streets Maintenance Supervisor	\$ 6,424	7/5/2021	unknown	unknown
14	Groveland Community Services District	N/C				

Summary Results	Top Monthly
Average of Comparators	\$ 8,620
% Rancho Murieta Community Services District Above/Below	-13.9%
Median of Comparators	\$ 8,628
% Rancho Murieta Community Services District Above/Below	-14.0%
Number of Matches	12

N/C - Non Comparator

- 1 - Calaveras County Water District: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 2 - City of Davis: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 3 - City of Modesto: Requires Grade II Water Treatment Operator certificate and Grade IV Water Distribution Operator certificate.
- 4 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches. Wastewater Collection Supervisor requires Grade III Collection System Maintenance; Water Distribution Supervisor requires Grade III Water Distribution Operator certificate and a Water Treatment Operator Grade II certificate; other certifications are not required.
- 5 - City of Woodland: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.
- 6 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 7 - Mammoth Community Water District: Line Maintenance Supervisor requires Grade III Water Distribution Operator and Grade III Collection System Technologist certificates.
- 8 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches. Underground Water Repair Supervisor requires Grade IV Water Distribution Operator.
- 9 - Tuolumne Utilities District: The Construction/Maintenance Superintendent requires a Grade IV Water Distribution Operator certificate.

**Rancho Murieta Community Services District
Appendix II: Market Compensation Findings (Sorted by Top Monthly Salary)
September 2021**

Utility Worker II						
Rank	Comparator Agency	Classification Title	Top Step	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	City of Folsom ³	[Water Utility Worker II/ Wastewater Collection Technician II]	\$ 6,722	7/1/2021	unknown	unknown
2	South Tahoe Public Utility District ⁸	[Underground Sewer Repair II/ Underground Water Repair II]	\$ 6,440	6/24/2021	6/23/2022	2.50%
3	City of Roseville ⁵	[Wastewater Utility Maintenance Worker II/ Water Distribution Worker II]	\$ 6,403	5/8/2021	unknown	unknown
4	Calaveras County Water District ¹	[Collection System Worker II/ Distribution Worker II]	\$ 5,785	7/1/2021	unknown	unknown
5	City of Davis ²	[Collections System Worker/ Water System Maintenance Worker]	\$ 5,754	7/13/2020	unknown	unknown
6	City of Yuba City ⁶	[Public Works Maintenance Worker II/ Wastewater Collections Maintenance Worker II]	\$ 5,736	7/31/2021	unknown	unknown
7	Amador Water Agency	Distribution II	\$ 5,732	7/1/2021	unknown	unknown
8	City of Modesto ⁴	Utilities Services Worker II	\$ 5,532	6/22/2021	6/21/2022	2.00%
9	Mammoth Community Water District ⁷	Line Maintenance Worker II	\$ 5,500	4/1/2021	4/1/2022	3.00%
10	Rancho Murieta Community Services District	Utility Worker II	\$ 5,222	1/1/2021	1/1/2022	3.50%
11	City of Woodland	Utilities Maintenance Worker II	\$ 5,185	7/1/2021	7/1/2022	3.00%
12	Groveland Community Services District	Distribution & Collection Systems Operator II	\$ 5,184	6/8/2021	unknown	unknown
13	Tuolumne Utilities District	Utility Worker 2	\$ 5,058	6/28/2021	6/27/2022	1.5% - 2.0%
14	City of Galt	Public Works Maintenance Worker II	\$ 4,321	7/5/2021	unknown	unknown

Summary Results	Top Monthly
Average of Comparators	\$ 5,642
% Rancho Murieta Community Services District Above/Below	-8.0%
Median of Comparators	\$ 5,732
% Rancho Murieta Community Services District Above/Below	-9.8%
Number of Matches	13

N/C - Non Comparator

1 - Calaveras County Water District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

2 - City of Davis: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

3 - City of Folsom: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

4 - City of Modesto: Requires Grade II Water Distribution Operator certificate.

5 - City of Roseville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches. Wastewater Utility Maintenance Worker II requires Grade I Collection System Maintenance certificate; Water Distribution Worker II requires Grade II Water Distribution Operator certificate.

6 - City of Yuba City: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches. Wastewater Collections Maintenance Worker II requires CWEA Collections System Maintenance Grade II certification.

7 - Mammoth Community Water District: Line Maintenance Worker II requires Grade I Collection System Maintenance Technologist or Grade II Water Distribution Operator certificate.

8 - South Tahoe Public Utility District: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches. Underground Sewer Repair II requires Grade II CWEA Collection Systems Maintenance Certification. Underground Water Repair II requires a Grade II Water Distribution Operator Certification.



Appendix III

Proposed Salary Range Schedule

Rancho Murieta Community Services District
Appendix III: Proposed Salary Range Schedule (Non-Represented)
September 2021

Range #	Monthly Salary Range		
	Minimum	Midpoint	Maximum
NR1	\$4,175	\$5,010	\$5,511
NR2	\$4,280	\$5,136	\$5,649
NR3	\$4,384	\$5,261	\$5,787
NR4	\$4,494	\$5,392	\$5,932
NR5	\$4,603	\$5,524	\$6,076
NR6	\$4,718	\$5,662	\$6,228
NR7	\$4,836	\$5,804	\$6,384
NR8	\$4,954	\$5,945	\$6,540
NR9	\$5,078	\$6,094	\$6,703
NR10	\$5,202	\$6,242	\$6,867
NR11	\$5,332	\$6,398	\$7,038
NR12	\$5,462	\$6,554	\$7,210
NR13	\$5,599	\$6,718	\$7,390
NR14	\$5,735	\$6,882	\$7,570
NR15	\$5,879	\$7,054	\$7,760
NR16	\$6,022	\$7,226	\$7,949
NR17	\$6,172	\$7,407	\$8,148
NR18	\$6,323	\$7,588	\$8,346
NR19	\$6,481	\$7,777	\$8,555
NR20	\$6,639	\$7,967	\$8,764
NR21	\$6,805	\$8,166	\$8,983
NR22	\$6,971	\$8,365	\$9,202
NR23	\$7,145	\$8,574	\$9,432
NR24	\$7,320	\$8,784	\$9,662
NR25	\$7,503	\$9,003	\$9,904
NR26	\$7,686	\$9,223	\$10,145
NR27	\$7,878	\$9,453	\$10,399
NR28	\$8,070	\$9,684	\$10,652
NR29	\$8,272	\$9,926	\$10,919
NR30	\$8,473	\$10,168	\$11,185
NR31	\$8,685	\$10,422	\$11,465
NR32	\$8,897	\$10,677	\$11,744
NR33	\$9,120	\$10,943	\$12,038
NR34	\$9,342	\$11,210	\$12,331
NR35	\$9,576	\$11,491	\$12,640
NR36	\$9,809	\$11,771	\$12,948
NR37	\$10,054	\$12,065	\$13,272
NR38	\$10,300	\$12,359	\$13,595
NR39	\$10,557	\$12,668	\$13,935
NR40	\$10,815	\$12,977	\$14,275
NR41	\$11,085	\$13,302	\$14,632
NR42	\$11,355	\$13,626	\$14,989
NR43	\$11,639	\$13,967	\$15,364
NR44	\$11,923	\$14,308	\$15,738
NR45	\$12,221	\$14,665	\$16,132
NR46	\$12,527	\$15,032	\$16,535
NR47	\$12,840	\$15,408	\$16,948
NR48	\$13,161	\$15,793	\$17,372
NR49	\$13,490	\$16,188	\$17,806
NR50	\$13,827	\$16,592	\$18,252
NR51	\$14,173	\$17,007	\$18,708
NR52	\$14,527	\$17,432	\$19,176
NR53	\$14,890	\$17,868	\$19,655
NR54	\$15,262	\$18,315	\$20,146
NR55	\$15,644	\$18,773	\$20,650
NR56	\$16,035	\$19,242	\$21,166
NR57	\$16,436	\$19,723	\$21,695
NR58	\$16,847	\$20,216	\$22,238
NR59	\$17,268	\$20,722	\$22,794
NR60	\$17,700	\$21,240	\$23,364
NR61	\$18,142	\$21,771	\$23,948

Rancho Murieta Community Services District
Appendix III: Proposed Salary Range Schedule (Represented)
September 2021

Range #	Monthly Salary Range					
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
1	\$2,221	\$2,333	\$2,444	\$2,555	\$2,666	\$2,777
2	\$2,277	\$2,391	\$2,505	\$2,619	\$2,732	\$2,846
3	\$2,333	\$2,449	\$2,566	\$2,682	\$2,799	\$2,916
4	\$2,391	\$2,510	\$2,630	\$2,749	\$2,869	\$2,989
5	\$2,449	\$2,572	\$2,694	\$2,817	\$2,939	\$3,061
6	\$2,510	\$2,636	\$2,761	\$2,887	\$3,012	\$3,138
7	\$2,573	\$2,702	\$2,830	\$2,959	\$3,088	\$3,216
8	\$2,636	\$2,768	\$2,900	\$3,031	\$3,163	\$3,295
9	\$2,702	\$2,837	\$2,972	\$3,107	\$3,242	\$3,377
10	\$2,768	\$2,906	\$3,044	\$3,183	\$3,321	\$3,460
11	\$2,837	\$2,979	\$3,121	\$3,262	\$3,404	\$3,546
12	\$2,906	\$3,051	\$3,197	\$3,342	\$3,487	\$3,633
13	\$2,979	\$3,128	\$3,277	\$3,426	\$3,575	\$3,723
14	\$3,051	\$3,204	\$3,357	\$3,509	\$3,662	\$3,814
15	\$3,128	\$3,284	\$3,440	\$3,597	\$3,753	\$3,910
16	\$3,204	\$3,364	\$3,524	\$3,685	\$3,845	\$4,005
17	\$3,284	\$3,448	\$3,612	\$3,777	\$3,941	\$4,105
18	\$3,364	\$3,532	\$3,701	\$3,869	\$4,037	\$4,205
19	\$3,448	\$3,621	\$3,793	\$3,966	\$4,138	\$4,310
20	\$3,532	\$3,709	\$3,886	\$4,062	\$4,239	\$4,415
21	\$3,621	\$3,802	\$3,983	\$4,164	\$4,345	\$4,526
22	\$3,709	\$3,894	\$4,080	\$4,265	\$4,451	\$4,636
23	\$3,802	\$3,992	\$4,182	\$4,372	\$4,562	\$4,752
24	\$3,894	\$4,089	\$4,284	\$4,479	\$4,673	\$4,868
25	\$3,992	\$4,191	\$4,391	\$4,591	\$4,790	\$4,990
26	\$4,089	\$4,294	\$4,498	\$4,703	\$4,907	\$5,111
27	\$4,191	\$4,401	\$4,611	\$4,820	\$5,030	\$5,239
28	\$4,294	\$4,508	\$4,723	\$4,938	\$5,152	\$5,367
29	\$4,401	\$4,621	\$4,841	\$5,061	\$5,281	\$5,501
30	\$4,508	\$4,734	\$4,959	\$5,185	\$5,410	\$5,635
31	\$4,621	\$4,852	\$5,083	\$5,314	\$5,545	\$5,776
32	\$4,734	\$4,970	\$5,207	\$5,444	\$5,680	\$5,917
33	\$4,852	\$5,095	\$5,337	\$5,580	\$5,822	\$6,065
34	\$4,970	\$5,219	\$5,467	\$5,716	\$5,965	\$6,213
35	\$5,095	\$5,349	\$5,604	\$5,859	\$6,114	\$6,368
36	\$5,219	\$5,480	\$5,741	\$6,002	\$6,263	\$6,524
37	\$5,349	\$5,617	\$5,884	\$6,152	\$6,419	\$6,687
38	\$5,480	\$5,754	\$6,028	\$6,302	\$6,576	\$6,850
39	\$5,617	\$5,898	\$6,179	\$6,459	\$6,740	\$7,021
40	\$5,754	\$6,042	\$6,329	\$6,617	\$6,905	\$7,192
41	\$5,898	\$6,193	\$6,488	\$6,782	\$7,077	\$7,372
42	\$6,042	\$6,344	\$6,646	\$6,948	\$7,250	\$7,552
43	\$6,193	\$6,502	\$6,812	\$7,122	\$7,431	\$7,741
44	\$6,344	\$6,661	\$6,978	\$7,295	\$7,612	\$7,930
45	\$6,502	\$6,827	\$7,152	\$7,478	\$7,803	\$8,128
46	\$6,661	\$6,994	\$7,327	\$7,660	\$7,993	\$8,326
47	\$6,827	\$7,169	\$7,510	\$7,851	\$8,193	\$8,534
48	\$6,994	\$7,344	\$7,693	\$8,043	\$8,393	\$8,742

Rancho Murieta Community Services District
Appendix III: Proposed Salary Range Schedule (Represented Security)
September 2021

Range #	Monthly Salary Range				
	Step 1	Step 2	Step 3	Step 4	Step 5
1	\$2,221	\$2,360	\$2,499	\$2,638	\$2,777
2	\$2,277	\$2,419	\$2,562	\$2,704	\$2,846
3	\$2,333	\$2,478	\$2,624	\$2,770	\$2,916
4	\$2,391	\$2,540	\$2,690	\$2,839	\$2,989
5	\$2,449	\$2,602	\$2,755	\$2,908	\$3,061
6	\$2,510	\$2,667	\$2,824	\$2,981	\$3,138
7	\$2,573	\$2,734	\$2,895	\$3,056	\$3,216
8	\$2,636	\$2,801	\$2,965	\$3,130	\$3,295
9	\$2,702	\$2,871	\$3,040	\$3,208	\$3,377
10	\$2,768	\$2,941	\$3,114	\$3,287	\$3,460
11	\$2,837	\$3,014	\$3,192	\$3,369	\$3,546
12	\$2,906	\$3,088	\$3,269	\$3,451	\$3,633
13	\$2,979	\$3,165	\$3,351	\$3,537	\$3,723
14	\$3,051	\$3,242	\$3,433	\$3,624	\$3,814
15	\$3,128	\$3,323	\$3,519	\$3,714	\$3,910
16	\$3,204	\$3,404	\$3,604	\$3,805	\$4,005
17	\$3,284	\$3,489	\$3,695	\$3,900	\$4,105
18	\$3,364	\$3,574	\$3,785	\$3,995	\$4,205
19	\$3,448	\$3,664	\$3,879	\$4,095	\$4,310
20	\$3,532	\$3,753	\$3,974	\$4,195	\$4,415
21	\$3,621	\$3,847	\$4,073	\$4,300	\$4,526
22	\$3,709	\$3,941	\$4,173	\$4,404	\$4,636
23	\$3,802	\$4,039	\$4,277	\$4,515	\$4,752
24	\$3,894	\$4,138	\$4,381	\$4,625	\$4,868
25	\$3,992	\$4,241	\$4,491	\$4,740	\$4,990



Appendix IV

Salary Range Placement Recommendations

Rancho Murieta Community Services District
Appendix IV: Salary Range Placement Recommendations
September 2021

Class Title	RMCS D Current Top Monthly Salary	Top Monthly Market Placement	Proposed Salary Range	Proposed Monthly Salary	Percent Difference	Rationale
Accounting Manager	\$11,286	\$10,310	NR28	\$10,652	-5.62%	Market and range placement; y-rate
Accounting Technician	\$5,430	\$5,688	30	\$5,635	3.78%	Market and range placement.
Chief Plant Operator	\$ 8,437	\$ 9,202	NR22	\$9,202	9.07%	Market and range placement.
Director of Administration	\$ 12,332	\$ 13,359	NR37	\$13,272	7.62%	Market and range placement.
Director of Operations	\$ 11,744	\$ 12,213	NR34	\$12,331	5.00%	Market and range placement.
District Engineer	Proposed	\$ 11,665	NR32	\$11,744	N/A	Market and range placement.
District Secretary	\$ 6,228	\$ 6,989	NR11	\$7,038	13.01%	Market and range placement.
Equipment Mechanic	\$ 6,421	\$ 6,222	34	\$6,213	-3.23%	Market and range placement; y-rate
General Manager	\$ 16,180	\$ 16,667	NR46	\$16,535	2.19%	Market and range placement.
Office Technician	\$ 4,107	\$ 4,051	16	\$4,005	-2.49%	Market and range placement; y-rate.
Operator in Training	\$4,755	N/A	24	\$4,868	2.38%	Internal alignment: 15% below Plant Operator I.
Plant Operator I	\$5,458	N/A	30	\$5,635	3.24%	Internal alignment: 15% below Plant Operator II.
Plant Operator II	\$6,356	\$ 6,578	36	\$6,524	2.64%	Market and range placement.
Plant Operator III	\$6,967	N/A	40	\$7,192	3.23%	Internal alignment: 10% above Plant Operator II.
Security Gate Officer	\$3,138	\$3,164	6	\$3,138	0.00%	Market and range placement.
Security Patrol Officer	\$3,956	N/A	16	\$4,005	1.24%	Internal alignment: 25% above Security Gate Officer.
Security Sergeant	\$6,380	N/A	NR7	\$6,384	0.06%	Internal alignment: 35% below the Security Chief.
Security Supervisor	\$8,764	\$7,804	NR15	\$7,760	-11.46%	Market and range placement; y-rate.
Utility Supervisor	\$7,571	\$8,628	NR19	\$8,555	13.00%	Market and range placement.
Utility Worker I	\$4,525	N/A	25	\$4,990	10.28%	Internal alignment: 15% below Utility Worker II.
Utility Worker II	\$5,222	\$5,732	31	\$5,776	10.61%	Market and range placement.
Utility Worker III	\$5,745	N/A	35	\$6,368	10.84%	Internal alignment: 10% above Utility Worker II.

Legend for columns:

Column 1 - Classification title.

Column 2 - RMCS D's current monthly maximum salaries.

Column 3 - Market placement shows the market median dollar values derived from the market survey results.

Column 4 - Salary range number of the consultant's newly proposed salary range schedule.

Column 5 - Top monthly salary of the consultant's newly proposed salary ranges.

Column 6 - This percentage expresses the difference between RMCS D's current salaries and the consultant's proposed top monthly salaries.

Column 7 - The rationale expresses how the consultant arrived at each proposed maximum monthly salary recommendation (i.e., the proposed range placement within the newly proposed salary range schedule).

6. Unrepresented Employee Salary - Pending

MEMORANDUM

Date: October 5, 2021
To: Personnel Committee
From: Paula O'Keefe, Director of Administration
Subject: Reclassification of Gate and Patrol Officers

RECOMMENDED ACTION

District Staff recommends the Personnel Committee move the reclassification and salary schedule (Attachment A) of the Gate and Patrol Officers to the Board meeting on October 20th.

BACKGROUND

Currently, the District has three vacant positions within Security, two Gate Officers and one Patrol Officer. These vacant positions have been posted for several months without finding successful candidates. While the positions have been posted in several different locations, the amount of applications has been minimal. The District was hopeful that the extended recruitment would enable the District to fill the vacant positions, however qualified candidates have not yet been identified through the recruitment process. Further, the Gate Officer position has had one applicant within the months of August and September.

To further compound the recruitment problem, it was evident that there is no potential for upward mobility within the current structure of the Security department. Typically there is a pathway to promotion within organizational structures, however, the District's current organizational structure only allows for potential promotion from Patrol Officer to Security Sergeant, a single classification with one authorized position, and the Gate Officers have no pathways for promotion.

After reviewing market descriptions, the likelihood of hiring qualified candidates diminishes for several reasons: compensation not in line with current market trends, location of the District, and outdated job descriptions and minimum qualifications allowing more inexperienced applicants to apply.

While the District generally prefers to make pay grade adjustments during the negotiations cycle, in order for the District to hire a qualified candidate during this critical time, it is necessary to upgrade the salary schedule and job descriptions to a professional level. The total cost to the District is projected to be approximately \$15,000 in base salary increases annually, based on the projections using the new salary range.

Staff recommends the following:

1. Update the job classifications to create a series for Security Gate Officer, thus creating an alternate classification series. Reclassifying the Security Gate Officer into a Security Gate Officer I/II will allow the District to fill vacant positions with qualified applicants at the journey level, who can perform the more complex level of workloads. By creating a classification series, this also allows the District to "promote in place" when staff hired at the entry level exhibit full competency, thus eliminating the need to create additional positions in order to provide pathways for promotion.
2. Update the job classifications to create a series for Security Patrol Officer, thus creating an alternate classification series. Reclassifying the Security Patrol Officer into a Security Patrol Officer I/II will allow

the District to fill vacant positions with qualified applicants at the journey level, who can perform the more complex level of workloads. By creating a classification series, this also allows the District to “promote in place” when staff hired at the entry level exhibit full competency, thus eliminating the need to create additional positions in order to provide pathways for promotion.

3. Review and move the proposed, corrected salary schedule change to add the distinction from the I and II class both Security Gate Officer and Security Patrol Officer.

It should be noted that an adjustment to the salary range does not result in an automatic adjustment to any employee’s rate of pay, unless the employee’s current rate of pay falls below the minimum of their new salary. If approved, supervisors will review each employee’s qualifications and pay ranges to determine eligibility of increase in pay and/or grade based on the new classification requirements.

SUMMARY

Staff have met with the Union steward regarding the job description and title changes for positions that are currently filled. At this time, the Union has no concerns with updating the existing positions based on feedback provided by the employees. Upon approval from the Personnel Committee, staff will provide updated information to the Board on October 20, 2021. Staff continue to recruit for the vacant positions with the hope that the increased salaries and addition of new classifications will assist with future recruitment efforts.

CURRENT SALARY SCHEDULE**2021 - 5-Step Wage Schedule****Effective January 1, 2021 - December 31, 2021**

		Step 1	Step 2	Step 3	Step 4	Step 5
Security Patrol Officer	Monthly	\$ 3,165.14	\$ 3,828.80	\$ 4,020.25	\$ 4,211.68	\$ 4,403.12
	Hourly	\$ 18.260	\$ 22.089	\$ 23.194	\$ 24.298	\$ 25.403
	Annual	\$ 37,981.68	\$ 45,945.60	\$ 48,243.00	\$ 50,540.16	\$ 52,837.44
Security Gate Officer	Monthly	\$ 2,510.20	\$ 3,218.21	\$ 3,379.12	\$ 3,540.02	\$ 3,700.94
	Hourly	\$ 14.482	\$ 18.567	\$ 19.495	\$ 20.423	\$ 21.352
	Annual	\$ 30,122.40	\$ 38,618.52	\$ 40,549.44	\$ 42,480.24	\$ 44,411.28

PROPOSED SALARY SCHEDULE**2021 - 5-Step Wage Schedule****Effective January 1, 2021 - December 31, 2021**

		Step 1	Step 2	Step 3	Step 4	Step 5
Security Patrol Officer I	Monthly	\$ 3,165.14	\$ 3,828.80	\$ 4,020.25	\$ 4,211.68	\$ 4,403.12
	Hourly	\$ 18.260	\$ 22.089	\$ 23.194	\$ 24.298	\$ 25.403
	Annual	\$ 37,981.68	\$ 45,945.60	\$ 48,243.00	\$ 50,540.16	\$ 52,837.44
Security Patrol Officer II	Monthly	\$ 4,211.68	\$ 4,422.26	\$ 4,643.38	\$ 4,875.55	\$ 5,119.32
	Hourly	\$ 24.298	\$ 25.513	\$ 26.789	\$ 28.128	\$ 29.535
	Annual	\$ 50,540.16	\$ 53,067.17	\$ 55,720.53	\$ 58,506.55	\$ 61,431.88
Security Gate Officer I	Monthly	\$ 2,510.20	\$ 3,218.21	\$ 3,379.12	\$ 3,540.02	\$ 3,700.94
	Hourly	\$ 14.482	\$ 18.567	\$ 19.495	\$ 20.423	\$ 21.352
	Annual	\$ 30,122.40	\$ 38,618.52	\$ 40,549.44	\$ 42,480.24	\$ 44,411.28
Security Gate Officer II	Monthly	\$ 3,540.02	\$ 3,717.02	\$ 3,902.87	\$ 4,098.02	\$ 4,302.92
	Hourly	\$ 20.423	\$ 21.444	\$ 22.517	\$ 23.642	\$ 24.825
	Annual	\$ 42,480.24	\$ 44,604.25	\$ 46,834.46	\$ 49,176.19	\$ 51,635.00

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

SECURITY GATE OFFICER I/II

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS -02/16/05-TBD

SUMMARY: To perform a variety of duties related to the control and monitoring of access to gated portions of the District; respond to inquiries and telephone calls; operate telephones and two way radio to communicate with other District personnel; and perform other related work as required.

SUPERVISION: Receives direct supervision from the Security ~~Sergeant Supervisor~~ Sergeant, and functional supervision from ~~Security Gate Officer II~~ and/or on-duty shift Patrol Officer ~~I/-or-II~~.

CLASS CHARACTERISTICS:

This is a series in which incumbents may be assigned to any level, provided they possess the required education and experience and successfully demonstrate proficiency which meets the qualifications for the class to which they are to be assigned.

SECURITY GATE OFFICER I is the entry level class in this series. Initially under close supervision in the Security department, incumbents perform the more routine, entry level duties while learning District policies and procedures and specific techniques related the role of a Gate Officer within the RMCSD Security Department. As experience is gained, assignments become more diversified and are performed under more general supervision.

SECURITY GATE OFFICER II is the journey level class in the series, fully competent to perform more responsible and complex duties. This position is under general supervision. Incumbents are expected to exercise independent judgment and making sound recommendations.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Controls and monitors access to and from gated portions within the District; provides information to District residents and visitors;

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- maintains a variety of records and statistics on vehicles and persons entering and leaving District; prepares daily reports of activities; answers telephone; provides telephone support for District as needed;
- responds to phone inquiries, and routes caller to appropriate person;
- operates radio dispatch equipment to communicate with other District personnel; monitors alarm systems;
- issues and maintains keys and other control devices for a variety of buildings and facilities;
- notifies District security personnel, law enforcement, rescue, and fire agencies of emergency situations, including suspect and vehicle identification; assists other department personnel in a variety of basic custodial and maintenance tasks;
- prepare documents and maintain basic records and information files;
- assist in training other Gate Officers.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Ability to learn and follow policies, rules and regulations relating to security and crime prevention programs; Learn to record basic data and prepare basic reports; Learn how to ~~operate effectively~~effectively operate a variety of telephone and radio communication equipment; deal courteously and effectively with the public; Establish and maintain cooperative working relationships; Speak, read and write at a level required for effective job performance; Understand and carry out oral and written instructions. Operate computer and related gate support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience which would provide the required knowledge and ability is qualifying. -A typical way to obtain this knowledge and ability would be:

Security Gate Officer I:

Minimum Education: High School diploma and/or equivalent.

Six months of experience requiring extensive public contact involving security and crime prevention functions is highly desirable.

Security Gate Officer II:

Minimum Education: High School diploma and/or equivalent.

Two years of experience requiring extensive public contact involving security and crime prevention functions is highly desirable –

OR

Possession of an Associates Degree in Criminal Justice, Public Administration, or related field.

CERTIFICATES, LICENSES, REGISTRATIONS:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

May possess a valid California Guard Card and Firearms Card.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand and sit. The employee is occasionally required to walk; use hands to finger, handle, or feel objects, tools, or controls; reach with hands and arms; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

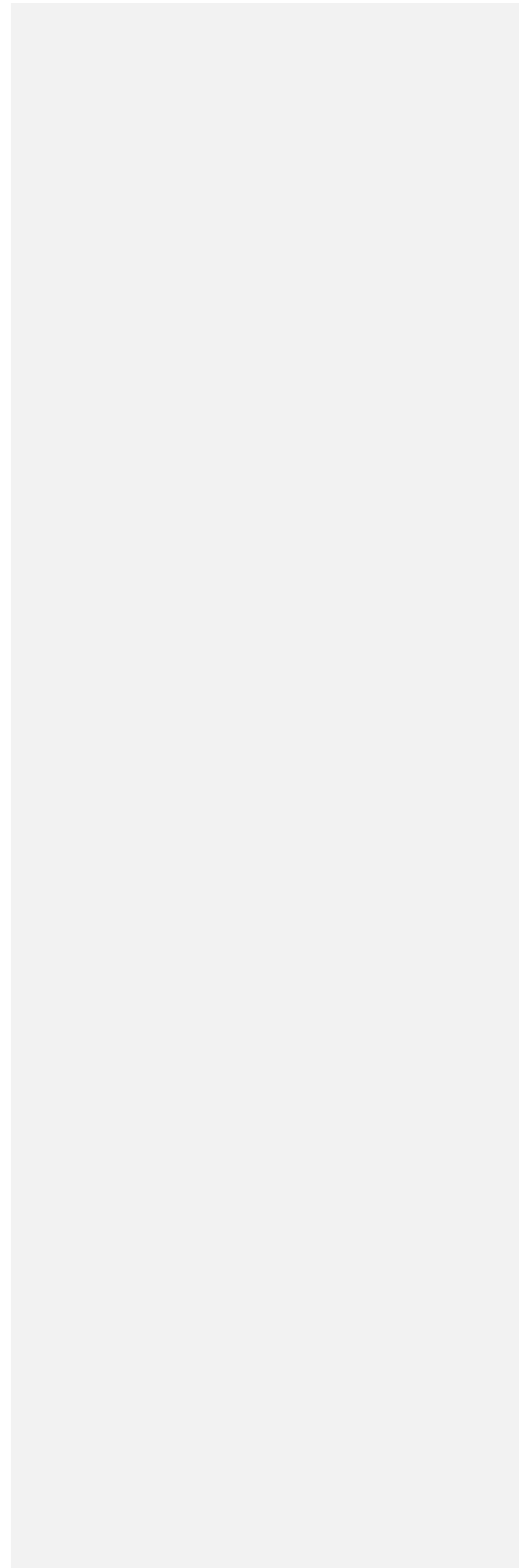
WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside

weather conditions.

The noise level in the work environment may vary due to vehicle noise at the gate.



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

SECURITY GATE OFFICER I/II

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS -TBD

SUMMARY: To perform a variety of duties related to the control and monitoring of access to gated portions of the District; respond to inquiries and telephone calls; operate telephones and two way radio to communicate with other District personnel; and perform other related work as required.

SUPERVISION: Receives direct supervision from the Security Sergeant and functional supervision from on-duty Patrol Officer I/II.

CLASS CHARACTERISTICS:

This is a series in which incumbents may be assigned to any level, provided they possess the required education and experience and successfully demonstrate proficiency which meets the qualifications for the class to which they are to be assigned.

SECURITY GATE OFFICER I is the entry level class in this series. Initially under close supervision in the Security department, incumbents perform the more routine, entry level duties while learning District policies and procedures and specific techniques related the role of a Gate Officer within the RMCS D Security Department. As experience is gained, assignments become more diversified and are performed under more general supervision.

SECURITY GATE OFFICER II is the journey level class in the series, fully competent to perform more responsible and complex duties. This position is under general supervision. Incumbents are expected to exercise independent judgment and making sound recommendations.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Controls and monitors access to and from gated portions within the District; provides information to District residents and visitors;
- maintains a variety of records and statistics on vehicles and persons entering and leaving District; prepares daily reports of activities; answers telephone; provides telephone support for District as needed;

- responds to phone inquiries, and routes caller to appropriate person;
- operates radio dispatch equipment to communicate with other District personnel; monitors alarm systems;
- issues and maintains keys and other control devices for a variety of buildings and facilities;
- notifies District security personnel, law enforcement, rescue, and fire agencies of emergency situations, including suspect and vehicle identification; assists other department personnel in a variety of basic custodial and maintenance tasks;
- prepare documents and maintain basic records and information files;
- assist in training other Gate Officers.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Ability to learn and follow policies, rules and regulations relating to security and crime prevention programs; Learn to record basic data and prepare basic reports; Learn how to effectively operate a variety of telephone and radio communication equipment; deal courteously and effectively with the public; Establish and maintain cooperative working relationships; Speak, read and write at a level required for effective job performance; Understand and carry out oral and written instructions. Operate computer and related gate support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience which would provide the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Security Gate Officer I:

Minimum Education: High School diploma and/or equivalent.

Six months of experience requiring extensive public contact involving security and crime prevention functions is highly desirable.

Security Gate Officer II:

Minimum Education: High School diploma and/or equivalent.

Two years of experience requiring extensive public contact involving security and crime prevention functions is highly desirable –

OR

Possession of an Associates Degree in Criminal Justice, Public Administration, or related field.

CERTIFICATES, LICENSES, REGISTRATIONS:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

May possess a valid California Guard Card and Firearms Card.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand and sit. The employee is occasionally required to walk; use hands to finger, handle, or feel objects, tools, or controls; reach with hands and arms; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside weather conditions.

The noise level in the work environment may vary due to vehicle noise at the gate.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

SECURITY PATROL OFFICER I

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS - TBD

SUMMARY: Perform security and crime prevention work by patrolling assigned areas; to observe and record incident information; answering calls and complaints; to gather information regarding incidents and complaints; to call on authorized law enforcement agencies when crimes occur; and to perform other ~~job-related~~job-related work as required.

SUPERVISION: Receives direct supervision from the Security Sergeant. Provides functional~~shift~~ supervision to Gate Officers and other Patrol Officers.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Performs patrol on an assigned shift; conducts property checks on businesses and homes for burglary and other security problems; request and record information from observers and other persons;
- assists with a variety of emergencies; issues citations for misdemeanors and infractions; assist outside agencies as needed;
- prepares reports of incidents and observations; contact victims, witnesses, and suspects for additional information as required; identify suspects or vehicles involved in an incident; secures voluntary statements from those suspected of involvement in incidents;
- has responsibility for preserving evidence at the scenes of incidents and crimes; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;
- performs traffic control assignments; assists with accident investigations; performs a variety of security and crime prevention assignments;
- substitute for or assist gate control officers as needed;

- enforce homeowner associations non-architectural rules;
- assist in training other Patrol and Gate Officers.

QUALIFICATION REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Skills in: Use and care of ~~fire-arms~~firearms and other special equipment utilized in security and crime prevention activities.

Ability to perform a variety of security and crime prevention assignments. Voluntarily secure information from others at the scene of incidents. Demonstrate keen abilities of observation and memory. Think clearly and act quickly in emergency situations. Understand and carry out oral and written directions. Prepare accurate incident and case reports. Use safety dispatch and other records systems. Tactfully and effectively represent the District in a variety of contacts. Establish and maintain cooperative working relationships.

EDUCATION AND/OR EXPERIENCE: Any combination of training and experience which would likely provide the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Education: High School diploma and/or equivalent.

One year of experience in security, crime prevention patrol activities, preferably including preliminary investigative work.

College level coursework in law enforcement, police science, criminology or a closely related field is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

Successful completion of the training requirements listed in Section 832 of the California Penal Code.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit. The employee is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift 50 and/or move up to 100 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside weather conditions.

The noise level in the work environment is usually moderate.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

SECURITY PATROL OFFICER I

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS - TBD

SUMMARY: Perform security and crime prevention work by patrolling assigned areas; to observe and record incident information; answering calls and complaints; to gather information regarding incidents and complaints; to call on authorized law enforcement agencies when crimes occur; and to perform other job-related work as required.

SUPERVISION: Receives direct supervision from the Security Sergeant. Provides functional supervision to Gate Officers and other Patrol Officers.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Performs patrol on an assigned shift; conducts property checks on businesses and homes for burglary and other security problems; request and record information from observers and other persons;
- assists with a variety of emergencies; issues citations for misdemeanors and infractions; assist outside agencies as needed;
- prepares reports of incidents and observations; contact victims, witnesses, and suspects for additional information as required; identify suspects or vehicles involved in an incident; secures voluntary statements from those suspected of involvement in incidents;
- has responsibility for preserving evidence at the scenes of incidents and crimes; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;
- performs traffic control assignments; assists with accident investigations; performs a variety of security and crime prevention assignments;
- substitute for or assist gate control officers as needed;

- enforce homeowner associations non-architectural rules;
- assist in training other Patrol and Gate Officers.

QUALIFICATION REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Skills in: Use and care of firearms and other special equipment utilized in security and crime prevention activities.

Ability to perform a variety of security and crime prevention assignments. Voluntarily secure information from others at the scene of incidents. Demonstrate keen abilities of observation and memory. Think clearly and act quickly in emergency situations. Understand and carry out oral and written directions. Prepare accurate incident and case reports. Use safety dispatch and other records systems. Tactfully and effectively represent the District in a variety of contacts. Establish and maintain cooperative working relationships.

EDUCATION AND/OR EXPERIENCE: Any combination of training and experience which would likely provide the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Education: High School diploma and/or equivalent.

One year of experience in security, crime prevention patrol activities, preferably including preliminary investigative work.

College level coursework in law enforcement, police science, criminology or a closely related field is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS: Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

Successful completion of the training requirements listed in Section 832 of the California Penal Code.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit. The employee is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift 50 and/or move up to 100 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside weather conditions.

The noise level in the work environment is usually moderate.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

-PATROL OFFICER II

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: N/A

APPROVED BY BOARD OF DIRECTORS – 07/20/05 TBD

SUMMARY: This position is the journey level in the Patrol Officer series. The position is responsible for the following: Participate in and supervise the activities of assigned gate control and patrol personnel; to supervise and participate in traffic control, incident reporting, training, administration, crime prevention, community relations and other assigned programs or functions; and to perform other ~~job-related~~job-related work as required.

SUPERVISION: Receives general supervision from the Security ~~Sergeant~~Chief. Provides ~~direct-functional~~ supervision over Patrol Officers I and Gate Officers I and II.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Performs patrol on an assigned shift; conducts property checks on businesses and homes for burglary and other security problems; request and record information from observers and other persons;
- has responsibility for preserving evidence at the scenes of incidents; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;
- performs traffic control assignments; assists with accident investigations; performs a variety of security and crime prevention assignments;
- substitute for or assist gate control officers as needed;
- enforce homeowner associations non-architectural rules;
- ~~Performs patrol on an assigned shift; conducts property checks on businesses and homes for burglary and other security problems; request and record information from observers and other persons;~~
- assists with a variety of emergencies; issues citations for misdemeanors and infractions; assist outside agencies as needed;

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- ~~prepares reports of incidents and observations; contact victims, witnesses, and suspects for additional information as required; identify suspects or vehicles involved in an incident; secures voluntary statements from those suspected of involvement in incidents;~~
- ~~has responsibility for preserving evidence at the scenes of incidents; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;~~
- disseminates current information to gate and patrol officers for assigned duties; ~~prepares work schedules; maintains discipline and ensures that~~ department rules and policies are followed;
- notifies agencies responsible for law enforcement and public health and safety when required and assists as directed;
- participates in ~~training new officers regular activities of assigned staff~~; assists officers in preparing reports and performs initial review of prepared reports; ~~appears in court to present evidence and testimony~~; maintains contact with law enforcement agencies;
- provides information and assistance to the public;
- ~~assists with performance evaluations; supervises and~~ participates in departmental training programs, administration, crime prevention, community relations and other assigned programs or functions;
- ~~prepares general reports of field activities; performs special data gathering assignments;~~

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SUPERVISORY RESPONSIBILITIES:

~~This is a first-level supervisory position with responsibility for assigning, supervising, and participating in the work of staff assigned to a specific area of security and crime prevention functions.~~

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Skills in: Use and care of ~~fire arms~~firearms and other special equipment utilized in

security and crime prevention activities.

Ability to supervise and participate in traffic control, incident investigation, training, administration, crime prevention, community relations and other assigned programs and functions; indirectly supervise, train and evaluate the work of subordinates; gather, assemble, analyze and evaluate facts and evidence; draw logical conclusions from information and make proper recommendations. Interpret and apply laws and regulations; analyze situations quickly and accurately and take effective courses of action; exercise restraint and judgment in emergency situations; demonstrate keen powers of observation and memory; prepare clear, concise and comprehensive written reports; tactfully and effectively represent the District in public contacts; establish and maintain cooperative working relationships.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience which would likely provide the required knowledge and ability is qualifying.– A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Three years of experience in security and crime prevention activities, preferably including some supervisory or leadworker experience; *or*

Possession of an Associate of Arts degree with a major in Police Science or related fields or substantial course work in law enforcement is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

Successful completion of the training requirements listed in Section 832 of the California Penal Code.

~~Possession~~ May possess a valid California Guard Card and Firearms Card.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

~~Possession of an appropriate American Red Cross First Aid Certificate and standard Cardiopulmonary Resuscitation (C.P.R.) certificate.~~

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand and sit. The employee is occasionally required to walk; climb or balance; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift 50 and/or move up to 100 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside weather conditions.

The noise level in the work environment is usually moderate.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

PATROL OFFICER II

DEPARTMENT: SECURITY

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: N/A

APPROVED BY BOARD OF DIRECTORS – TBD

SUMMARY: This position is the journey level in the Patrol Officer series. The position is responsible for the following: participate in and supervise the activities of assigned gate control and patrol personnel; to supervise and participate in traffic control, incident reporting, training, administration, crime prevention, community relations and other assigned programs or functions; and to perform other job-related work as required.

SUPERVISION: Receives general supervision from the Security Sergeant. Provides functional supervision over Patrol Officers I and Gate Officers I and II.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Performs patrol on an assigned shift; conducts property checks on businesses and homes for burglary and other security problems; request and record information from observers and other persons;
- has responsibility for preserving evidence at the scenes of incidents; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;
- performs traffic control assignments; assists with accident investigations; performs a variety of security and crime prevention assignments;
- substitute for or assist gate control officers as needed;
- enforce homeowner associations non-architectural rules;
- assists with a variety of emergencies; issues citations for misdemeanors and infractions; assist outside agencies as needed;
- prepares reports of incidents and observations; contact victims, witnesses, and suspects for additional information as required; identify suspects or vehicles involved in an incident; secures voluntary statements from those suspected of

involvement in incidents;

- has responsibility for preserving evidence at the scenes of incidents; appears in court proceedings when summoned; contacts responsible public safety agencies for dealing with potential criminal incidents, booking, and transportation of persons;
- disseminates current information to gate and patrol officers for assigned duties; ensures department rules and policies are followed;
- notifies agencies responsible for law enforcement and public health and safety when required and assists as directed;
- participates in training new officers; assists officers in preparing reports and performs initial review of prepared reports; maintains contact with law enforcement agencies;
- provides information and assistance to the public;
- participates in departmental training programs, administration, crime prevention, community relations and other assigned programs or functions;
- prepares general reports of field activities; performs special data gathering assignments;

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Skills in: Use and care of firearms and other special equipment utilized in security and crime prevention activities.

Ability to supervise and participate in traffic control, incident investigation, training, administration, crime prevention, community relations and other assigned programs and functions; indirectly supervise, train and evaluate the work of subordinates; gather, assemble, analyze and evaluate facts and evidence; draw logical conclusions from information and make proper recommendations. Interpret and apply laws and regulations; analyze situations quickly and accurately and take effective courses of action; exercise restraint and judgment in emergency situations; demonstrate keen powers of observation and memory; prepare clear, concise and comprehensive written reports; tactfully and effectively represent the District in public contacts; establish and maintain cooperative working relationships.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience which would likely provide the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Three years of experience in security and crime prevention activities, preferably including some supervisory or leadworker experience; *or*

Possession of an Associate of Arts degree with a major in Police Science or related fields or substantial course work in law enforcement is desirable.

CERTIFICATES, LICENSES, REGISTRATIONS:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

Successful completion of the training requirements listed in Section 832 of the California Penal Code.

May possess a valid California Guard Card and Firearms Card.

Ability to acquire the American Red Cross Basic First Aid and Cardiopulmonary (C.P.R.) certificates during the initial year of employment.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand and sit. The employee is occasionally required to walk; climb or balance; and stoop, kneel, crouch, or crawl.

The employee must occasionally lift 50 and/or move up to 100 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee occasionally works in outside

weather conditions.

The noise level in the work environment is usually moderate.

MEMORANDUM

Date: October 5, 2021
To: Personnel Committee
From: Paula O'Keefe, Director of Administration
Subject: Request for Two Full Time Accounting Technician Positions

RECOMMENDED ACTION

District Staff recommends the Personnel Committee move the request for two additional Full Time Accounting Technician to the October 20th Board meeting for approval.

BACKGROUND

In May of 2021, the District reorganized and reclassified several positions within the Administration office. This reorganization allowed District staff to review, evaluate and update the job duties for each of the impacted classifications. At the time, the hope was to provide much needed acknowledgment and redistribution of workload amongst the full and part time staff.

Because the District has had high turnover within recent months, it was apparent that an analysis of workload was necessary to determine the whether the high volume of workload required additional staffing. After evaluating the desk duties, it became evident that the workload was such that key tasks were not being completed timely or not at all due to the sheer volume of workload and inefficient processes and was a contributing factor in the exist of the employees. After a few months of evaluation of the clerical and support accounting staff workload, it became very evident that the workload should be split into three categories for the Accounting Technician:

Accounts Payable and Receivable
Utility Billing
HR/Payroll

The highest priority of the Administration Division is to thoroughly reconcile the General Ledger (G/L) in preparation for a new Enterprise Resource Planning (ERP), create and maintain proper fund accounting and establish policies, procedures and reporting to ensure the systems are correctly maintained. The District's professional accounting team is integral to this process as the bandwidth of each of their positions is necessary to complete past-due work, ongoing activities and maintain it going forward. Because each position is critical to ensuring workload and goals are completed and internal controls are followed, the District continues to become more behind in day to day operating duties because the staffing levels are not sufficient enough to perform all of the regular day to day activities. Although the District has part time assistance, it is still not enough to allow the Accounting Technician to complete past due work and maintain a regular payment cycle and complete all tasks required within the job classification.

Currently, the District has a single Accounting Technician position that is responsible for A/P, A/R, Payroll, Utility Billing and supports the front desk with customer service, bank deposits, and other accounting functions, leaving a significant gap in several processes relating to all three of these major job components. Two prior incumbents

incurred 20+ hours of overtime each pay period to process payroll and A/P, while leaving other tasks untouched. This left our current staff with nearly a years' worth of backlog, filing, outstanding invoices unpaid from prior fiscal year and payroll reporting that had not been completed timely, accurately or in some cases, not at all.

After the previous incumbent left, staff spent a great deal of time evaluating the day to day tasks; it became very evident that additional full time staffing is needed. The District has been able to somewhat maintain the day to day functionality within the Administration office by using part time staffing to augment full time employees. This practice has its drawbacks, primarily the amount of time and effort needed to train a part time employee to perform the work functions. In the past, part time employees were not invested in the outcomes of project goals, daily duties and the District as a whole, and have left for full time jobs with benefits, once again leaving the District with gaps in knowledge base. After cycling through several full time staff and part time staff, the knowledge base becomes smaller each time, thus creating a larger gap and bigger backlog. In order to prevent the constant cycling of part time staff, the District must create two additional Accounting Technician positions to hire full time, permanent staffing.

Currently, staff are actively working to pay all past due invoices while continuing to pay bills on time. This has been an arduous process as the systems used to process payables are cumbersome and inefficient. Additionally, the Director of Administration has been processing payroll since August, another time consuming and cumbersome process that engulfs 30% of the workweek to complete, while the backlog of HR/Payroll tasks continues to grow.

While the District generally submits position requests during the budget development cycle, staff are concerned that without the proper staffing levels, the District will fall more behind and will continue to be unable to report accurate financial reporting monthly to the Board without the support needed to process our A/P in a timely manner.

The total cost of two new fully benefitted Accounting Technician positions is projected at \$158,625 (Attachment A).

In addition to correcting the Accounting Technician job description to remove the roles and responsibilities outlined below, staff is requesting the following additional positions:

1. One Accounting Technician to perform HR, Payroll, Benefits administration, PERS reporting, assist in the administration of the District-wide training program, OSHA reporting, assist the Director of Administration with Workers' Compensation processing and Risk Management liability claims, onboarding/offboarding of staff, assist in the facilitation of safety meetings and provide general support for all staff in relation to Human Resources matters. This position is critical to ensuring all HR and Payroll functions are completed timely and accurately. The District severely lacks a dedicated full time individual with Human Resources skills and abilities to manage the day to day tasks associated high volume workload. While the District will be refining processes with the implementation of an ERP system, the system is not anticipated to be fully implemented for upwards of 12 months and the level of workload for this position will not be impacted in a way that would eliminate the need for a full time employee. With the addition of this position, the District will be in a much better position to provide better support for its employees.
2. Accounting Technician to perform Utility Billing. This position will be responsible for utility billing, including processing monthly billing statements, payment processing and daily deposits, researching discrepancies, assisting residents with complaints, recommending payment adjustments, working with Operations

Personnel on meter re-reads, work and service orders, move in and move outs, reporting on water consumption, maintain escrow files, fee schedule and much more. Currently these functions are being completed by Platinum Utility Star project manager every month and District staff run the monthly meter reads and manage customer service. Because the majority of the utility billing is completed outside of the District, coordinating efforts amongst both parties can cause delays in processing transactions due to the availability of the project manager. Overall, the District has had some success with this process, but due to the turnover, what tasks that were being processed within the District have become backlogged.

SUMMARY

Upon approval from the Personnel Committee, staff will provide updated information to the Board on October 20, 2021. Staff is expected to immediately start recruiting for the vacant position with Board approval. These additional positions will allow the District to redistribute the workload more efficiently and allow staff the ability to catch up the existing backlog and set efficient processes for the future.

Annual Increase in Cost - Two Accounting Technician Positions

Classification	Step C	Annual Salary Cost	PERS Employer Cost	Health Benefits Cost - Annualized	Other Benefits Cost - Annualized	Travel Expenses	Total Annual Cost
Accounting Technician (Utility Billing Specialist)	4,690.25	56,283.00	4,271.88	14,660.57	3,376.98	720.00	79,312.43
Accounting Technician (Human Resources Specialist)	4,690.25	56,283.00	4,271.88	14,660.57	3,376.98	720.00	79,312.43
Total	9,380.50	112,566.00	8,543.76	29,321.14	6,753.96	1,440.00	158,624.86

* Based on 2021 represented salary schedule

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

ACCOUNTING TECHNICIAN

DEPARTMENT: ADMINISTRATION

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS ~~—02/16/05-TBD—~~

REVISED 05/19/2021

SUMMARY: To perform professional accounting and financial recordkeeping work; to assist in the preparation of financial statements, documents, analyses and reports; to personally perform complex and detailed accounting work; and to perform other job-related work as required.

SUPERVISION: Receives direct supervision from the Accounting Manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

Performs a variety of technical and specialized financial, ~~personnel,~~ budgetary and statistical recordkeeping work in District general ledger, accounts payable and receivables, ~~water billing, payroll,~~ and budget activities, provides customer services in person and by telephone; performs cashiering duties as necessary;

Responsible for accounts payable; sorts and distributes invoices from vendors; contacts vendors regarding invoices and payments; processes invoices; receives departmental approval; enters all pertinent information into the District's computer system; generates, prints and mails checks for payment; files and maintains copies of checks with invoice backups; creates various accounts payable reports; responsible for vendor database and 1099 processing;

~~Processes utility customer requests; assists customers with questions regarding accounts and activity, answers questions and provides information to the public, investigates complaints and recommends corrective action as necessary to resolve complaints;~~

Maintains miscellaneous accounts receivable, including adding new invoices, recording paid invoices, working with customers and monitoring past due invoices and following up on past due accounts;

Assists Accounting staff with maintaining the developer deposits and prepares reports as needed;

Prepares annual write-offs for the District;

Prepares, reviews and maintains a variety of financial and statistical records involving cashiering, customer service and utility billing to include the receipt, balancing and posting of cash funds; gathers, assembles, tabulates, checks and files financial data;

~~Coordinates collection procedures; establish payment plans; works closely with Field Operations on accounts with service interruptions;~~

Identifies and recommends ways to improve policies and procedures related to customer service;

Provides general support to the Accountant and Accounting Manager and support in the absence of the Office Technician.

DISTINGUISHING CHARACTERISTICS:

This is the full working level in the Accounting Technician class series. Incumbents in this class work under minimal supervision in any of the work areas specified in the definition above. They are expected to perform all types of accounting support and professional accounting work related to the development and maintenance of District fiscal and accounting systems. Incumbents will be assigned specific duties according to the District's needs and the individual's ability.

QUALIFICATION REQUIREMENTS:

Knowledgeable in procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and personnel recordkeeping systems. Practices of financial, personnel and statistical recordkeeping, including automated accounting and bookkeeping systems. Basic budget preparation procedures. Filing methods and procedures. Correct English usage, spelling, grammar and punctuation. Basic governmental accounting principles and procedures. Modern office practices, procedures and equipment.

Ability to perform a variety of arithmetical calculations with speed and accuracy. Interpret and apply laws, regulations and policies. Maintain cooperative working relationships with those contacted in the course of the work. Carry out directions independent of close supervision. Operate computer and related accounting and office support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience providing the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Two years of technical experience in financial, accounting, personnel or statistical recordkeeping activities; *or*

Possession of a two-year college degree with a major emphasis in accounting, business management, or a closely related field (Two years of experience performing comparable duties to this position may be substituted for the college degree).

LICENSE AND/OR CERTIFICATES:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

PHYSICAL DEMANDS:

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone.

Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects up to 25 pounds with the use of proper equipment.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made on a case-by-case basis to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. The noise level in the work environment is usually quiet.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

ACCOUNTING TECHNICIAN

DEPARTMENT: ADMINISTRATION

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS –TBD

REVISED 05/19/2021

SUMMARY: To perform professional accounting and financial recordkeeping work; to assist in the preparation of financial statements, documents, analyses and reports; to personally perform complex and detailed accounting work; and to perform other job-related work as required.

SUPERVISION: Receives direct supervision from the Accounting Manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

Performs a variety of technical and specialized financial, budgetary and statistical recordkeeping work in District general ledger, accounts payable and receivables, and budget activities, provides customer service in person and by telephone; performs cashiering duties as necessary;

Responsible for accounts payable; sorts and distributes invoices from vendors; contacts vendors regarding invoices and payments; processes invoices; receives departmental approval; enters all pertinent information into the District's computer system; generates, prints and mails checks for payment; files and maintains copies of checks with invoice backups; creates various accounts payable reports; responsible for vendor database and 1099 processing;

Maintains miscellaneous accounts receivable, including adding new invoices, recording paid invoices, working with customers and monitoring past due invoices and following up on past due accounts;

Assists Accounting staff with maintaining the developer deposits and prepares reports as needed;

Prepares annual write-offs for the District;

Prepares, reviews and maintains a variety of financial and statistical records involving cashiering, customer service and utility billing to include the receipt, balancing and posting of cash funds; gathers, assembles, tabulates, checks and files financial data;

Identifies and recommends ways to improve policies and procedures related to customer service;

Provides general support to the Accountant and Accounting Manager and support in the absence of the Office Technician.

DISTINGUISHING CHARACTERISTICS:

This is the full working level in the Accounting Technician class series. Incumbents in this class work under minimal supervision in any of the work areas specified in the definition above. They are expected to perform all types of accounting support and professional accounting work related to the development and maintenance of District fiscal and accounting systems. Incumbents will be assigned specific duties according to the District's needs and the individual's ability.

QUALIFICATION REQUIREMENTS:

Knowledgeable in procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and personnel recordkeeping systems. Practices of financial, personnel and statistical recordkeeping, including automated accounting and bookkeeping systems. Basic budget preparation procedures. Filing methods and procedures. Correct English usage, spelling, grammar and punctuation. Basic governmental accounting principles and procedures. Modern office practices, procedures and equipment.

Ability to perform a variety of arithmetical calculations with speed and accuracy. Interpret and apply laws, regulations and policies. Maintain cooperative working relationships with those contacted in the course of the work. Carry out directions independent of close supervision. Operate computer and related accounting and office support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience providing the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Two years of technical experience in financial, accounting, personnel or statistical recordkeeping activities; *or*

Possession of a two-year college degree with a major emphasis in accounting, business management, or a closely related field (Two years of experience performing comparable duties to this position may be substituted for the college degree).

LICENSE AND/OR CERTIFICATES:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance

of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

PHYSICAL DEMANDS:

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone.

Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects up to 25 pounds with the use of proper equipment.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made on a case-by-case basis to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. The noise level in the work environment is usually quiet.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

ACCOUNTING TECHNICIAN **(working title Utility Billing Specialist)**

Formatted: Centered

DEPARTMENT: ADMINISTRATION

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS – 02/16/05

REVISED 05/19/2021

SUMMARY: To perform professional accounting and financial recordkeeping work; to assist in the preparation of financial statements, documents, analyses and reports; to personally perform complex and detailed accounting work; and to perform other job-related work as required.

SUPERVISION: Receives direct supervision from the Accounting Manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

Performs a variety of technical and specialized financial, ~~personnel, budgetary~~ and statistical recordkeeping work in ~~District general ledger~~, accounts payable and receivables, water billing, ~~payroll, and budget activities~~, provides customer services in person and by telephone; performs cashiering duties ~~as necessary~~;

~~Responsible for accounts payable; sorts and distributes invoices from vendors; contacts vendors regarding invoices and payments; processes invoices; receives departmental approval; enters all pertinent information into the District's computer system; generates, prints and mails checks for payment; files and maintains copies of checks with invoice backups; creates various accounts payable reports; responsible for vendor database and 4099 processing;~~

~~Provides daily counter services; processes forms and collects payments for all District services and explains utility billings to the general public;~~

Processes utility customer requests; assists customers with questions regarding accounts and activity, answers questions and provides information to the public, investigates complaints and recommends corrective action as necessary to resolve complaints;

~~Runs a variety of reports; researches and resolves discrepancies related to transactions and customer accounts;~~

~~Maintains miscellaneous accounts receivable, including adding new invoices, recording paid invoices, working with customers and monitoring past due invoices and following up on past due accounts;~~

Prepares annual write-offs for the District;

Prepares, reviews and maintains a variety of financial and statistical records involving cashiering, customer service and utility billing to include the receipt, balancing and posting of cash funds and check receipts; gathers, assembles, tabulates, checks and files financial data;

Coordinates collection procedures; establish payment plans; works closely with Field Operations on accounts with service interruptions;

~~Identifies and recommends ways to improve policies and procedures related to customer service;~~

~~Processes utility service changes to include starts or stops of service, move in/move outs, interruptions of service as well as discount program; Communicates all new starts or stops of service and work orders to field personnel;~~

~~Operates a personal computer to access customer account data from multiple computer systems; interprets and explains charges, policies and procedures and initiates appropriated transactions to satisfy customer service request and internal procedures;~~

~~Manages and maintains escrow files;~~

~~Performs a variety of general clerical duties including computer data entry and typing and maintaining files and records;~~

~~Identifies and recommends ways to improve policies and procedures related to customer service;~~

Provides general support to the Accountant and Accounting Manager and support in the absence of the Office Technician.

DISTINGUISHING CHARACTERISTICS:

This is the full working level in the Accounting Technician class series. Incumbents in this class work under minimal supervision in any of the work areas specified in the definition above. They are expected to perform all types of accounting support and professional accounting work related to the development and maintenance of District fiscal and accounting systems. Incumbents will be assigned specific duties according to the District's needs and the individual's ability.

QUALIFICATION REQUIREMENTS:

Knowledgeable in procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and personnel recordkeeping systems. Practices of financial, personnel and statistical recordkeeping, including automated accounting and bookkeeping systems. Basic budget preparation procedures. Filing methods and

procedures. Correct English usage, spelling, grammar and punctuation. Basic governmental accounting principles and procedures. Modern office practices, procedures and equipment.

Ability to perform a variety of arithmetical calculations with speed and accuracy. Interpret and apply laws, regulations and policies. Maintain cooperative working relationships with those contacted in the course of the work. Carry out directions independent of close supervision. Operate computer and related accounting and office support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience providing the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Two years of technical experience in financial, accounting, personnel or statistical recordkeeping activities; *or*

Possession of a two-year college degree with a major emphasis in accounting, business management, or a closely related field (Two years of experience performing comparable duties to this position may be substituted for the college degree).

LICENSE AND/OR CERTIFICATES:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

PHYSICAL DEMANDS:

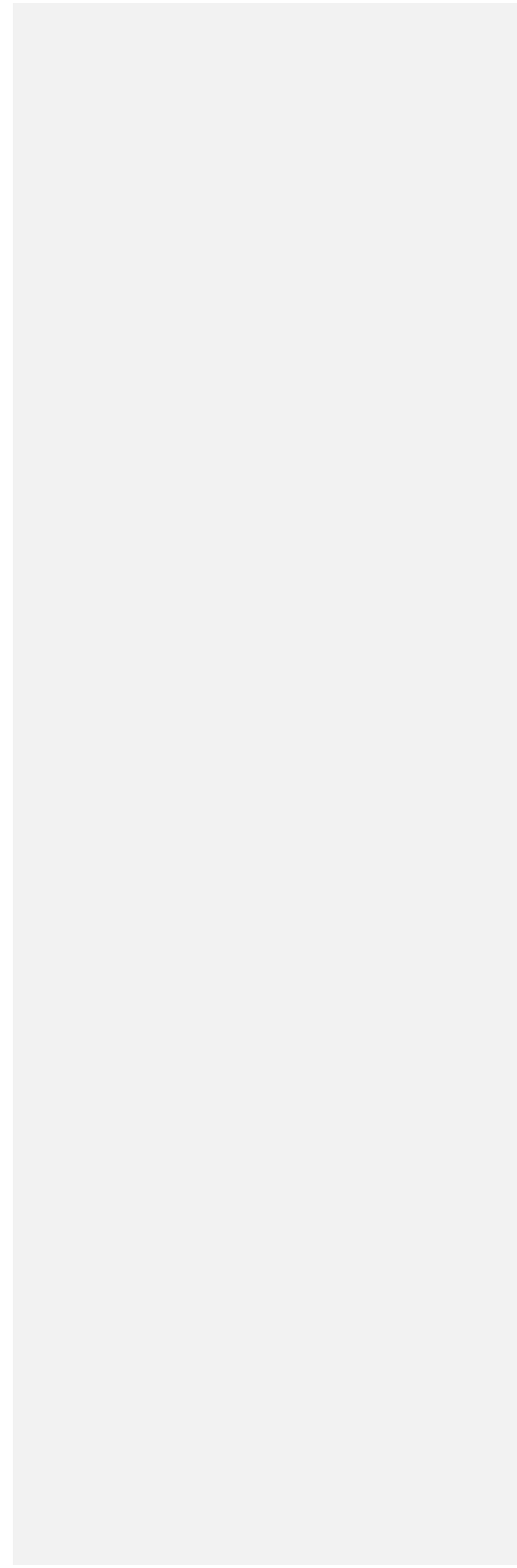
Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone.

Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects up to 25 pounds with the use of proper equipment.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made on a case-by-case basis to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. The noise level in the work environment is usually quiet.



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

ACCOUNTING TECHNICIAN **(working title Utility Billing Specialist)**

DEPARTMENT: ADMINISTRATION

FLSA OVERTIME STATUS: NON-EXEMPT
BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS – 02/16/05
REVISED 05/19/2021

SUMMARY: To perform professional accounting and financial recordkeeping work; to assist in the preparation of financial statements, documents, analyses and reports; to personally perform complex and detailed accounting work; and to perform other job-related work as required.

SUPERVISION: Receives direct supervision from the Accounting Manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

Performs a variety of technical and specialized financial, and statistical recordkeeping work in accounts receivables, water billing, , provides customer services in person and by telephone; performs cashiering duties;

Provides daily counter services; processes forms and collects payments for all District services and explains utility billings to the general public;

Processes utility customer requests; assists customers with questions regarding accounts and activity, answers questions and provides information to the public, investigates complaints and recommends corrective action as necessary to resolve complaints;

Runs a variety of reports; researches and resolves discrepancies related to transactions and customer accounts;

Prepares annual write-offs for the District;

Prepares, reviews and maintains a variety of financial and statistical records involving cashiering, customer service and utility billing to include the receipt, balancing and posting of cash funds and check receipts; gathers, assembles, tabulates, checks and files financial data;

Coordinates collection procedures; establish payment plans; works closely with Field Operations on accounts with service interruptions;

Processes utility service changes to include starts or stops of service, move in/move outs, interruptions of service as well as discount program; Communicates all new starts or stops of service and work orders to field personnel;

Operates a personal computer to access customer account data from multiple computer systems; interprets and explains charges, policies and procedures and initiates appropriated transactions to satisfy customer service request and internal procedures;

Manages and maintains escrow files;

Performs a variety of general clerical duties including computer data entry and typing and maintaining files and records;

Identifies and recommends ways to improve policies and procedures related to customer service; Provides general support to the Accountant and Accounting Manager and support in the absence of the Office Technician.

DISTINGUISHING CHARACTERISTICS:

This is the full working level in the Accounting Technician class series. Incumbents in this class work under minimal supervision in any of the work areas specified in the definition above. They are expected to perform all types of accounting support and professional accounting work related to the development and maintenance of District fiscal and accounting systems. Incumbents will be assigned specific duties according to the District's needs and the individual's ability.

QUALIFICATION REQUIREMENTS:

Knowledgeable in procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and personnel recordkeeping systems. Practices of financial, personnel and statistical recordkeeping, including automated accounting and bookkeeping systems. Basic budget preparation procedures. Filing methods and procedures. Correct English usage, spelling, grammar and punctuation. Basic governmental accounting principles and procedures. Modern office practices, procedures and equipment.

Ability to perform a variety of arithmetical calculations with speed and accuracy. Interpret and apply laws, regulations and policies. Maintain cooperative working relationships with those contacted in the course of the work. Carry out directions independent of close supervision. Operate computer and related accounting and office support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience providing the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Two years of technical experience in financial, accounting, personnel or statistical recordkeeping activities; *or*

Possession of a two-year college degree with a major emphasis in accounting, business management, or a closely related field (Two years of experience performing comparable duties to this position may be substituted for the college degree).

LICENSE AND/OR CERTIFICATES:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

PHYSICAL DEMANDS:

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone.

Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects up to 25 pounds with the use of proper equipment.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made on a case-by-case basis to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. The noise level in the work environment is usually quiet.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

ACCOUNTING TECHNICIAN

(working title Human Resources Specialist)

DEPARTMENT: ADMINISTRATION

FLSA OVERTIME STATUS: NON-EXEMPT

BARGAINING UNIT: OPERATING ENGINEERS LOCAL 3

APPROVED BY BOARD OF DIRECTORS -TBD

SUMMARY: Perform a wide variety of complex technical and professional administrative duties in support of Human Resources programs. Position requires a high degree of independent judgment and confidentiality. Perform work related to District payroll activities involving the analysis and implementation of payroll regulations and laws, and the processing of payroll and preparation. Coordinates and organizes recruitment processes and training programs, manages benefits administration, supports the District's Safety & Risk Management programs, and maintains confidential personnel records and files.

SUPERVISION: Receives direct supervision from the Director of Administration.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

Receives, reviews, verifies and processes payroll records, documentation and related records; audits such documents for completeness, accuracy and conformance with policies and procedures;

Assures compliance with City, State and Federal requirements; prepares quarterly, annual and W-2 tax reporting statements; processes retirement plan contributions; analyze employee pay, deductions and benefits to determine the correct amount to report to state and federal agencies;

Assists the Director of Administration in carrying out confidential personnel transactions; such as salaries, benefits, promotions, special pays, reclassifications, demotions, suspensions, terminations and other related matters;

Performs all annual reports, including year-end, updates of tax tables and PERS rates, processing of payroll accruals, and processing of yearly leave pay-outs for different bargaining units;

Performs a variety of responsible clerical/technical work in support of the department including customer service needs; assist employees, departments, and customers by providing information, explaining procedures and answering questions over the telephone

and in person;

Coordinates the implementation of the recruitment and selection process, including all tasks required to ensure a smooth recruitment, pre-employment and new hire process. May facilitate oral interviews and prepare recommendation letter for General Manager.

Coordinates and organizes implementation of various training activities, including scheduling of outside training sources, and logistical coordination of annual District training conference. Verifies completion of training and schedules make-up training.

Provides administrative support for the District's Safety Program, including safety committee minutes, coordination of required physical exams and random drug/alcohol testing.

Provides administrative support to the District's Risk Management programs, including safety inspection response compilation, records maintenance, and insurance program renewal documentation.

Assists with a variety of special human resources projects, including administrative support for labor negotiations, salary and benefits surveys, and risk management (property, liability, workers' compensation) programs.

Administers, organizes, maintains, automates, and implements short and long-term retention of all personnel, safety, and other related files in accordance with applicable regulations and personnel procedures, in both paper and electronic formats. Ensures complete confidentiality of all employee human resources records.

Completes all required forms and notifications relating to health, life, and disability insurance, retirement/deferred compensation, and flexible benefit plan enrollment, changes, termination, and/or COBRA, and disseminates employee information regarding same.

Adheres to and enforces stated safety policies and procedures.

DISTINGUISHING CHARACTERISTICS:

This is the full working level in the Accounting Technician class series. Incumbents in this class work under minimal supervision in any of the work areas specified in the definition above. They are expected to perform all types of accounting support and professional accounting work related to the development and maintenance of District fiscal and accounting systems. Incumbents will be assigned specific duties according to the District's needs and the individual's ability.

QUALIFICATION REQUIREMENTS:

Knowledgeable in procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and personnel recordkeeping systems. Practices of financial, personnel and statistical recordkeeping, including automated accounting and bookkeeping systems. Basic budget preparation procedures. Filing methods and procedures. Correct English usage, spelling, grammar and punctuation. Basic governmental

accounting principles and procedures. Modern office practices, procedures and equipment.

Ability to perform a variety of arithmetical calculations with speed and accuracy. Interpret and apply laws, regulations and policies. Maintain cooperative working relationships with those contacted in the course of the work. Carry out directions independent of close supervision. Operate computer and related accounting and office support software.

EDUCATION AND/OR EXPERIENCE:

Any combination of training and experience which would provide the required knowledge and ability is qualifying. A typical way to obtain this knowledge and ability would be:

Minimum Education: High School diploma and/or equivalent.

Two years of technical experience in financial, accounting, personnel or statistical recordkeeping activities; or

Possession of a two-year college degree with a major emphasis in accounting, business management, or a closely related field (Two years of experience performing comparable duties to this position may be substituted for the college degree).

CERTIFICATES, LICENSES, REGISTRATIONS:

Possession of the category of California Driver's license required by the State Department of Motor Vehicles to perform the essential duties of the position. Continued maintenance of a valid driver's license, insurability, and compliance with established District vehicle operation standards are a condition of continuing employment.

PHYSICAL DEMANDS:

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone.

Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push and pull materials and objects up to 25 pounds with the use of proper equipment.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made on a case-by-case basis to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff

and/or public and private representatives in interpreting and enforcing departmental policies and procedures. The noise level in the work environment is usually quiet.

10. Policy P2021-XX Workplace Conduct - Pending