

State of California

MEMORANDUM

MM Ref. #88-31 (Revision)

Date: December 16, 1988

To: PERSONNEL MANAGEMENT LIAISONS

NOTE: Please distribute a copy of this memo and attachment to your Departmental Personnel Office.

From: Department of Personnel Administration
Classification and Compensation Division

Subject: Attachment to Business Service Officer Allocation Guides (MM #88-31 dated December 14, 1988).

Attached is an Allocation Worksheet which is to be used when allocating positions in the Business Service classes. This worksheet was inadvertently omitted from the previous memo dated December 14, 1988, which transmitted a copy of the draft Allocation Guides.

If you have any questions, please contact Duella Farmer of my staff on 324-9406 (ATSS 454-9406).



Frank Tanaka, Senior Section Manager
Classification and Compensation Division

Attachment

BUSINESS SERVICE POSITION ALLOCATION WORKSHEET

Requested Class: _____ Approved Class: _____

Position Number/Location: _____

Approval Date: _____ Approved By: _____

Indicate by a check mark in the appropriate column the level of complexity.

FUNCTION/FACTORS	FUNCTION COMPLEXITY		
	Least	Ave.	Most
A. Applicable to all positions in all classes:			
1. Span of Control/Scope of Responsibility			
2. Building Ownership			

INSTRUCTIONS

In the Function Supv'd? column indicate whether the incumbent will have supervisory and decision making authority for the Function by a check mark under Y for yes or N for no. In the Function column show % of time spent on each Function. In the Factor Complexity column indicate by a check mark the level of complexity of each factor assigned to the position which will be performed by the incumbent.

FUNCTION/FACTORS	FUNCTION SUPV'D?		FUNCTION COMPLEXITY	% OF TIME	FACTOR COMPLEXITY		
	Y	N			Least	Ave.	Most
1. Equip./Supplies			LEAST				
Factor A							
" B							
" C							
2. Support Services			LEAST				
Factor A							
" B							
3. Building Management			LEAST				
Factor A							
Sub-total			#	%			
4. Capitol Outlay			AVERAGE				
Factor A							
" B							
5. Purchasing			AVERAGE				
Factor A							
" B							
" C							

FUNCTION/FACTORS	FUNCTION SUPV'D?		FUNCTION COMPLEX-ITY	% OF TIME	FACTOR COMPLEXITY		
	Y	N			Least	Ave.	Most
6. Telecommunications Factor A " B			AVERAGE	*			
* Function is "least complex" if Telecommunications Analysts or Managers exist in the Department.							
7. Facilities Mgmt. Factor A " B " C			AVERAGE				
Sub-total			#	%			
8. Special Studies Factor A			MOST				
9. Contracts Factor A " B " C " D			MOST				
10. Facilities Planning and Acquisition Factor A " B			MOST				
Sub-total			#	%			
TOTAL			#	%			

COMPLETE THE FOLLOWING SECTION IF THE REQUESTED ALLOCATION DOES NOT MEET THE TYPICAL ALLOCATION CRITERIA FOR THE CLASS.

MITIGATING FACTORS: Describe below and on the following page the mitigating factor(s) which apply to this position and the impact should the requested level/class be denied.

State of California

MEMORANDUM

MM Ref. # 88-31

Date: December 14, 1988

To: PERSONNEL MANAGEMENT LIAISONS

NOTE: Please distribute a copy of this memo and attachments to your Departmental Personnel Office.

From: Department of Personnel Administration
Classification and Compensation Division

Subject: Business Service Officer Allocations

Attached for your review is a draft Board memo including a proposed revised specification for the Business Service Officer series. The proposed revisions, which are the result of an extensive study by the Department of Personnel Administration and Consultants from ten Departments, clarify the definition and appropriate usage of the various levels within this series. Also attached are the proposed allocation guides for positions in business service settings.

Essentially, the results of the study confirm that, while some problems exist in the appropriate use of this series, the major problem has been in determining the proper level to which individual positions should be allocated. Secondly have been the problems of determining the most appropriate use of the Associate Business Management Analyst class and what class should be assigned to manage the largest and most complex Business Service Shops (i.e. Staff Services Manager I or Business Service Officer IV).

It is the belief of both the Department of Personnel Administration and the Business Service Consultants that the attached documents address these three major allocation issues; accurately reflect the manner in which the series is best utilized; and preserve the status, rights and eligibilities of employees. The item will be scheduled for a Board meeting date after Department and Union response to the attached is received and any expressed concerns are resolved. If, as a result of Department and Union input, significant changes to the attached documents are made, they will be reissued for additional review.

All questions and comments regarding the attached proposal from department staff should be coordinated with and submitted through the departmental Personnel Office. Questions and comments should be directed to Duella Farmer of my staff on 324-9406 (ATSS 454-9406), or by writing to her at 1515 S Street, North Building, Suite 400, Sacramento, CA 95814), no later than January 16, 1989.

Frank Tanaka

Frank Tanaka, Senior Section Manager
Classification and Compensation Division

Attachments

TO: STATE PERSONNEL BOARD

FROM: Evelyn Chaney, Personnel Management Analyst
Classification and Compensation Division

Duella Farmer, Assistant Section Manager
Classification and Compensation Division

REVIEWED BY: Frank Tanaka, Senior Section Manager
Classification and Compensation Division

SUBJECT: The Department of Personnel Administration proposes the following:

- .Establish a new deep class of Business Service Assistant (Specialist);
- .Abolish the existing classes of Business Service Assistant and Business Management Trainee and reallocate the positions and incumbents into the proposed new deep class;
- .Reallocate positions and incumbents of the existing Management Services Technician class assigned business service duties into the proposed new deep class and provide split off eligibility for one year to the remaining incumbents and eligibles;
- .Revise the Management Services Technician class specification to delete reference to its use in a business service setting;
- .Revise the specifications for the four Business Service Officer I and II (Specialist and Supervisor) classes and the Business Service Officer III class to clarify their concepts and differences;
- .Revise the Minimum Qualifications of the Business Service Officer series and the Associate Business Management Analyst class to recognize and clearly identify the existing and appropriate new recruitment bases;
- .Consolidate the individual class specifications for six Business Service Officer classes into a single series specification;
- .Abolish the Business Service Officer IV class; and
- .Revise the probationary period from 6 to 12 months for the Business Service Officer I (Supervisor), Business Service Officer II (Supervisor) and Business Service Officer III classes.

SUMMARY OF ISSUES:

In recognition of the difficulty departments have experienced with determining the appropriate allocation of positions in their business service offices, the Department of Personnel Administration (DPA) initiated a study to identify and resolve the issues. As a result of that study, the DPA proposes to revise the classification plan and class specifications and to establish allocation guidelines for business service classes and positions as shown above in the

"Subject". The proposed revisions and guidelines are necessary to clarify the Typical Tasks, update the Minimum Qualifications and provide departments with the information needed to properly allocate positions in their business service shops. There are no changes to the class concepts.

CONSULTED WITH:

BUSINESS SERVICE OFFICER CONSULTANT GROUP

Martin Anderson, Department of the California Youth Authority
Clifford Boisa, Air Resources Board
Cathy Corgiat, Employment Development Department
Dennis Dunbar, Department of the California Highway Patrol
Ron Heavener, Air Resources Board
Steve Irwin, California Conservation Corps
Lydia Michael, Franchise Tax Board
Mark Penrose, Department of Food and Agriculture
Vern Powers, Department of Motor Vehicles
Sharon Rakela, Public Employees Retirement System
PETE McCLORY, CSEA
CARL HEPPLER, California State Supervisors, CSEA
RICK McWILLIAM, Department of Personnel Administration
LUCIANO ORTIZ, State Personnel Board
PAUL NAKASHIMA, State Personnel Board

BACKGROUND:

The Business Service Officer series was established in 1946. At that time, there were only two levels in the series -- Business Service Officer I (BSO I) and Business Service Officer III (BSO III). As the variety and amount of business service activity increased throughout State service, it created a need for additional business service related classes to perform the work. Consequently, the Business Service Officer II (BSO II) class was established in 1952 to supervise subordinate staff and perform the most complex work. This change allowed the BSO III more time for the administrative duties required of a business service shop manager. In 1965, the Business Management Trainee (BMT) and Business Service Assistant (BSA) classes were established to provide entry into the series for college graduates and existing State employees. Also in 1965, the Business Service Officer IV (BSO IV) class was established to supervise and manage the largest and most complex business service shops. In 1976, the Associate Business Management Analyst (ABMA) class was established for those positions which performed a combination of technical business service work and analytical work related to budgeting, management and administrative analysis. Lastly, the Business Service Officer I and II classes, which had dual supervisory and specialist concepts, were each split in 1984 into separate Supervisor and Specialist classes. Since then, the concepts of these classes have remained essentially the same.

Over the years, however, Departments have experienced increasing difficulty in determining the appropriate allocation for individual positions assigned work

of a business service nature. Of particular concern to the Departments have been distinguishing the differences between levels in the BSO series; determining the amount, level and type of work appropriate for allocation to an ABMA position; and determining the classification series and level most appropriate for managing the largest and most complex business service shops.

As the DPA became aware of the magnitude of the issues, it initiated a study to determine appropriate resolutions. To incorporate departmental perspective into the final product, a consultant group of persons who are or who supervise business service staff was established to work with the DPA staff. This document is the result of that study.

STUDY RESULTS:

The classes and positions included in the study are:

1. Business Management Trainee
2. Business Service Assistant
3. Business Service Officer I (Specialist)
4. Business Service Officer I (Supervisor)
5. Business Service Officer II (Specialist)
6. Business Service Officer II (Supervisor)
7. Business Service Officer III
8. Business Service Officer IV
9. Associate Business Management Analyst
10. Management Services Technician (Positions in business service shops only)
11. Staff Services Manager I (Positions in business service shops only)

The Consultants and DPA staff reviewed the available existing documentation relative to the above classes and reached the following conclusions:

1. The class specifications for the first nine classes noted above do not clearly distinguish between the Typical Tasks, Knowledges, Skills or Abilities required for the individual levels.
2. The first eight classes are virtually identical in the Typical Tasks to be performed and the Knowledges, Skills and Abilities required to perform those tasks.
3. The Management Services Technician class specification addresses the appropriateness of using the class in a business service setting but does not clearly describe the type of duties to be performed.
4. The Associate Business Management Analyst class specification is descriptive of the type of work to be performed but not the level of such work.
5. The Business Service Officer IV class specification indicates it should manage the largest and most complex business service shops; however, there are no incumbents in this class. In fact, such business service shops are currently being managed by Staff Services Managers I.
6. The Staff Services Manager I class specification does not specifically address the appropriateness of its use in a business service setting.

However, the duties of such positions require primarily an administrative supervisor not a technical expert; SSM I is at the same level as BSO IV; and the use of SSM I in such a setting has long been determined appropriate by both the State Personnel Board and DPA staff.

7. Although standards exist for allocating business service positions, the criteria are nebulous and have not been formally approved by the SPB or DPA. They have, however, been used by the Departments and DPA staff as guides to assist in position allocation decisions.

To identify the level, type and variety of business service tasks performed by incumbents of the various classes, a questionnaire was developed to elicit this information from business service position incumbents. The questionnaire was sent to every Department for distribution to and completion by all persons occupying professional level business service positions. Approximately 208 (72%) of these questionnaires were completed and returned to DPA.

A review of the completed questionnaires showed that incumbents in each class performed, to some extent, duties related to virtually every business service activity. The information provided confirmed that there was a variety of level of duties within each function and identified, from the incumbents' perspective, the comparative difficulty and complexity of the different business service functions performed in a business service shop. This information was used to determine the relative complexities of one business service function to another and classify each function as either Most, Average, or Least complex and difficult. Using the Consultants' personal knowledge of the duties required to perform each function and, to the extent possible, information obtained from the questionnaires, the specific duties within each function were identified and also classified as Most, Average, or Least complex and difficult.

The above factors were instrumental in developing the attached proposed series specification. In addition, a comparison of the level of duties performed was made with other analytical classes in the Fiscal, Management and Staff Services group. The most appropriate comparisons were identified as being with the Management Services Technician (MST), Staff Services Analyst (SSA), Associate Governmental Program Analyst (AGPA), Staff Services Manager I (SSM I) classes. The concept of these classes is to perform or supervise staff and analytical work in a variety of administrative support functions where there is no specialist series available for such work. As specialist series are established, positions and incumbents are reallocated to the corresponding level in the specialist series.

Business services is an administrative support function with a specialist series as are personnel, budgets and management analysis. All of these series have similar levels as well as entry and progression patterns. There are established, accepted and fairly well defined allocation standards for allocating positions to the MST/SSA/AGPA classes. These allocation standards and comparisons, as well as the relative complexities of the various business service functions, were used as benchmarks for the following proposal.

CLASSIFICATION CONSIDERATIONS:

Except as noted below, the following proposal will not have an impact on existing classes, employees or allocations.

1. Business Service Assistant (Specialist) - Establish a new deep class with a 12 month probationary period; reallocate positions and incumbents from existing classes as necessary and abolish the existing Business Service Assistant and Business Management Trainee classes.

The class concept of the proposed new deep class of Business Service Assistant (Specialist) is consistent with that of the existing Management Services Technician class in that it will function as the entry, trainee and first working level for it's series. Establishment of the proposed new deep class will be accomplished by combining into a single class the duties and responsibilities currently allocated to the existing Business Management Trainee and Business Service Assistant classes and Management Services Technician positions assigned business service duties for a majority of the time. These classes have essentially the same Minimum Qualifications and may be assigned similar business service duties and responsibilities. A review of the class specifications, completed questionnaires and available duty statements indicate that there is little if any difference between the way these classes are used in a business service setting.

The proposed Minimum Qualifications are consistent with other entry level professional classes and provide both a promotional and open examination pattern. Movement between the alternate ranges of the proposed new deep class will be provided for by establishing the attached Alternate Range Criteria.

The proposed probationary period will be 12 months, which is consistent with other deep classes. This period is needed in order to evaluate the full range of duties performed.

With establishment of the proposed new deep class, the duties and responsibilities currently allocated to the existing classes and positions will be reallocated to the proposed new deep class. It is essential that these duties and responsibilities continue to be performed. Thus, the positions and incumbents currently allocated to the existing Business Management Trainee and Business Service Assistant classes and positions and incumbents currently allocated to the Management Services Technician class who are assigned business service duties for a majority of the time are all proposed for reallocation to the proposed new deep class. When this is accomplished, the existing Business Management Trainee and Business Service Assistant classes are recommended to be abolished.

The Management Services Technician class is used in other disciplines besides business services and not all positions or incumbents are proposed

for reallocation to the proposed new deep class. Thus, it is not recommended that the Management Services Technician class be abolished.

2. Management Services Technician - Revise the class specification to delete reference to its use in a business service setting.

Currently the Typical Tasks section of the Management Services Technician specification provides for use of the class in a business service setting. With establishment of the proposed new deep class, this use would no longer be appropriate or necessary. As a result, the DPA recommends that the class specification be revised as shown in this calendar to delete reference to its use in a business service setting.

3. Business Service Officer I and II (Specialist and Supervisor) and Business Service Officer III classes - Revise the specifications for these five classes to clarify their usage, concepts and differences and consolidate them into a single series specification.

- a) The Typical Tasks and Knowledges, Skills and Abilities sections in the class specifications for these five classes are almost identical.
- b) The Definition sections contain many adjective terms which are not described either in the respective class specifications or the existing allocation guides. Some examples of the terms used and not defined are:

"Perform work of average difficulty";

"Small/medium/large division, geographic region, or Department";

"Act as assistant/overall assistant to a higher level Business Service Officer"; and

"Have charge of a major and complex portion of the business service activities".

- c) The open patterns reflect a need for a broad business service background at all levels. The study results indicate the lower levels require less breadth than do the higher levels. In addition, the individual functions with which competitors should be familiar are not highlighted.

Using the study results, MST/SSA/AGPA class concepts and existing allocation guides as benchmarks, the DPA proposes consolidation of the classes into a single series specification and the following revisions to the Definitions and Minimum Qualifications sections in the series specification:

A. Business Service Officer I (Specialist)

Class Definition:

Current:

Under general supervision, to perform assigned business service activities of average difficulty, in a small division, geographical

region or department, or as an assistant to a higher level business officer.

Proposed:

Incumbents may independently perform technical and, for less than 50% of the time, analytical business service work of average difficulty in a variety of functions; assist in the performance of the most difficult and complex business service work; or be assigned responsibility for one or more functions of average difficulty. Functions of average difficulty are Purchasing, Facilities Management, Capitol Outlay and Telecommunications. (Analytical work of average difficulty is described as that which would otherwise be appropriate for a Staff Services Analyst.)

Incumbents are non-supervisory but may serve as lead over lower level staff. With an appropriate restructuring of duties, positions allocated to this class may be downgraded to Business Service Assistant (Specialist) for recruitment purposes.

Minimum Qualifications:

The changes proposed are to (a) reflect the title of the proposed new deep class and eliminate the title of the existing Business Service Assistant class which is proposed for abolishment; (b) include as qualifying experience one year as a Staff Services Analyst (SSA), Range B or Junior Staff Analyst (JSA), Range B in a business service assignment; and (c) clarify the type of experiences most beneficial to open competitors.

Experience gained as a SSA or JSA in a business service assignment is recognized by the SPB as approved experience for competition in the examination process. However, neither class is specifically included in the Business Service Officer I (Specialist) Minimum Qualifications. Inclusion of the classes in the Minimum Qualifications will clearly identify them as being in the Business Service Officer series promotional pattern.

There are no significant changes proposed for the open pattern. Instead the DPA proposes the wording be revised to highlight the level and type of work typical for the class. This will clarify for potential competitors the type of experiences most relevant to the class for which they are applying.

B. Business Service Officer I (Supervisor)

Class Definition:

Current:

Under general supervision, serves either (1) as the Business Service

Officer of a small division, geographical region or department, or (2) as an assistant to a higher level business officer.

Proposed:

This is the first supervisory level in the series. Under general supervision, incumbents typically have full supervisory responsibility for approximately 3 - 6 lower level staff in a business service shop which may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

Typically, incumbents either (1) supervise all business service functions in the smallest business service shops and personally perform the most difficult and complex technical and analytical business service work; or (2) in larger shops, supervise one or more business service functions of average difficulty or two or more functions of least complexity as assistant to a higher level Business Service Officer and assist with the performance of more difficult and complex business service work.

NOTE: The functions of least complexity are identified in the Definition section of the series specification which describes Business Service Assistant (Specialist).

Minimum Qualifications:

The only changes proposed are the same as those proposed for the Business Service Officer I (Specialist) class.

C. Business Service Officer II (Specialist)

Class Definition:

Current:

Under direction, to perform either (1) all of the business service activities of a medium-sized geographic region or department; or (2) a major and complex portion of the business service activities of a larger department; or (3) to act as the overall assistant to a higher level departmental Business Service Officer.

Proposed:

Under direction, incumbents either (1) perform the most difficult and complex technical work of a business service nature in a wide variety of functions; or (2) are assigned responsibility for one or more of the most difficult and complex technical functions which are Facilities Planning and Acquisition and Contracts. In addition, incumbents may also be assigned responsibility to complete special analytical studies for less than 50% of the time. (The level of

analytical work performed is described as that which would otherwise be appropriate for an Associate Management Analyst.)

Positions are non-supervisory but may serve as lead over lower level staff.

Minimum Qualifications:

The changes proposed are to (a) delete the abolished class of Service and Supply Officer I; (b) include as qualifying experience one year as a Staff Services Analyst, Range C performing business service duties; and (c) clarify the type of experiences most beneficial to open competitors.

The Service and Supply Officer I class no longer exists. It was retitled Hospital General Services Administrator I (HGSA I). The HGSA I class is already included in the Minimum Qualifications for Business Services Officer II. The proposal to include Staff Services Analysts is consistent with the change proposed for the Business Service Officer I level. Also, it recognizes that Staff Services Analyst positions may appropriately be utilized in business service settings and allows the incumbents of these positions into the examination process for the Business Service Officer II level; a process from which they are currently excluded.

The changes proposed for the open pattern are minor word changes intended to bring focus upon the type of work typical for the class.

D. Business Service Officer II (Supervisor)

Class Definition:

Current:

Under direction, to have charge of either (1) all of the business service activities of a medium-sized geographic region or department; or (2) a major and complex portion of the business service activities of a larger department; or (3) to act as the overall assistant to a higher level departmental business service officer.

Proposed:

Under direction, incumbents either (1) supervise all of the business service functions of a small to medium sized business service shop and personally perform the most difficult and complex technical and analytical work; or (2) in larger shops, supervise two or more business service functions of average difficulty or one or more of the most complex functions as assistant to the business service shop manager and assist with the performance of other difficult and complex work.

Incumbents typically directly supervise 7 - 12 staff of which one or more are Business Service Assistant (Specialist) or Business Service Officer I (either Specialist or Supervisor). Other classes supervised may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

Minimum Qualifications:

The only changes proposed are the same changes proposed for the Business Service Officer II (Specialist) class.

E. Business Service Officer III

Class Definition:

Current:

Under direction, to (1) have charge of the business service program of a large department, including a broad range of business activities; or (2) to be responsible for several extensive and complex business service activities on a statewide or major regional basis.

Proposed:

Under direction, incumbents typically supervise (1) all business service functions in a medium to large sized business service shop; or (2) in larger shops, two or more of the most complex functions. In addition, incumbents may personally perform technical or analytical business service work of highest complexity.

Typically incumbents are second or third level supervisor over 13 - 20 staff with at least 6 subordinate Business Service Officers.

Minimum Qualifications:

The only change proposed is to delete from qualifying experience the requirement for one year performing the duties of Hospital General Services Administrator I (HGSA I). It is apparent that this was included in the specification in error as (a) one year of HGSA I experience is qualifying to take the BSO II exam; and (b) two years of HGSA I experience is also indicated on the BSO III specification as qualifying experience to take the exam.

Staff considered including as qualifying experience to take the examination one year performing the duties of Hospital General Services Administrator II. This was not done as the class is at the same level as Business Service Officer III and incumbents are therefore transferrable.

4. Associate Business Management Analyst - Revise the Job Characteristics and Minimum Qualifications sections of the class specification to clearly identify the level and amount of analytical work required and appropriate recruitment bases.

Job Characteristics

The only change proposed is inclusion of the words "no less than 51% Associate level". This change clearly identifies the level and amount of analytical work required for a position to be allocated to the ABMA class instead of to the BSO series.

Minimum Qualifications

The current Minimum Qualifications for this class are: One year of experience performing the duties of (1) a Staff Services Analyst, Range C, or (2) a Business Service Officer I.

The class of Associate Business Management Analyst is at a higher level than Business Service Officer II (Specialist and Supervisor); however, the Business Service Officer II (Specialist and Supervisor) classes are not included in the Minimum Qualifications for Associate Business Management Analyst. To correct this inequity in promotional opportunities and update the class titles, the DPA proposes the Minimum Qualifications for Associate Business Management Analyst be revised to a) include six months of experience performing the duties of a Business Service Officer II (Specialist or Supervisor) and b) change the class title of Business Service Officer I to reflect the correct Supervisor and Specialist class titles.

5. Abolish the Business Service Officer IV classification.

When established, the concept of this class was to manage the largest and most complex business service shops. Since that time, Departments, SPB and DPA have come to realize that the skills and abilities needed to manage these shops were more administrative in nature than previously conceived. Consequently, allocations to these positions have been determined more appropriate for the Staff Services Manager I class. Currently, the Business Service Officer IV classification has no incumbents. In view of these factors, the DPA recommends that the Business Service Officer IV class be abolished.

PROBATIONARY PERIODS:

1. As indicated previously, the probationary period recommended for the proposed new deep class is 12 months. This is consistent with the probationary period for other deep classes and provide the time needed to evaluate the performance of incumbents.
2. The DPA also proposes that the following classes each have their

probationary period extended to 12 months. This is consistent with other comparable classes and the standards for supervisory probationary periods as shown in the Personnel Management Policy and Procedures Manual Section 320. This period of time is required to adequately evaluate the performance of new incumbents.

Business Service Officer I (Supervisor)
Business Service Officer II (Supervisor)
Business Service Officer III

EMPLOYEE STATUS CONSIDERATIONS:

1. The DPA proposes to reallocate all positions and incumbents from the Business Service Assistant and Business Management Trainee classes and those positions and incumbents of the Management Services Technician class assigned business service duties for a majority of the time to the proposed new deep class. In addition, the Management Services Technician incumbents who are not reallocated will be provided split off eligibility to the proposed new deep class for one year. These actions guarantee that the impacted employees will retain all their current status, rights and eligibilities including their existing probationary periods.

With the exception of Business Management Trainees who have been at the maximum salary of their class for one year or longer, employees will be moved to the salary range of the proposed new deep class which corresponds with the salary range of their current class and retain their current salary and salary anniversary dates. Business Management Trainees who have been at the maximum salary of their class for one year or longer will be moved to the salary range of the proposed new deep class which corresponds to the salary range of their current class and provided with an immediate one step salary increase.

Effective the same day as the reallocation, and upon recommendation of their appointing authority, employees may be moved to a higher alternate range for which they meet the criteria. Upon such movement, the employees will receive a salary increase and new salary anniversary date as provided for by DPA Rule 599.676.

2. Current employees in classes with revised probationary periods will not have their probationary period extended. They will retain their original probationary period of 6 months from date of appointment.
3. Except as previously noted, there will be no immediate impact on positions which are filled at the time this proposal is adopted. However, the filling of all vacant positions and the reclassification of filled or vacant positions effective on or after the date of Board action must comply with the new and revised class specifications approved by the Board.
4. There are no Business Service Officer IV incumbents so there will be no impact on employees as a result of abolishing the class.

RECOMMENDATIONS:

1. That the class of Business Service Assistant (Specialist) be established; the proposed specification for the class appearing in the proposed Business Service Officer series specification shown in the current calendar be adopted; and the probationary period for the class be 12 months.
2. That the proposed revised specification for the following classes appearing in the Business Service Officer series specification shown in the current calendar be adopted.

Business Service Officer I (Specialist)
Business Service Officer I (Supervisor)
Business Service Officer II (Specialist)
Business Service Officer II (Supervisor)
Business Service Officer III

3. That the proposed revised specifications for the following classes as shown in this calendar be adopted:

Management Services Technician
Associate Business Management Analyst

4. That the proposed Alternate Range Criteria 274 for the class of Business Service Assistant (Specialist) as shown in this calendar be adopted.
5. That the following resolutions be adopted:

A. WHEREAS the State Personnel Board on ----- established the class of Business Service Assistant (Specialist); and the duties and responsibilities of this class are substantially included in the previously existing classes of Business Service Assistant and Business Management Trainee: Therefore be it

RESOLVED, That all positions now classified as Business Service Assistant and Business Management Trainee be reallocated to the class of Business Service Assistant (Specialist), and that each person with civil service status in the class Business Service Assistant and Business Management Trainee on ----- be hereby granted civil service status without further examination in the class of Business Service Assistant (Specialist); and be it further

RESOLVED, That any existing employment lists other than reemployment lists established for the classes of Business Service Assistant and Business Management Trainee indicated in Column I shall be used to certify to fill vacancies in the class indicated in Column II until such lists are abolished, exhausted, or superseded by lists for the class indicated in Column II, and persons on any existing reemployment lists for the classes

of Business Service Assistant and Business Management Trainee indicated in Column I shall also be placed on reemployment lists for the class indicated in Column II until expiration of their eligibility on the reemployment lists for the classes indicated in Column I.

Column I

Column II

Business Service Assistant
Business Management Trainee

Business Service Assistant (Specialist)

B. WHEREAS the State Personnel Board on ----- established the class of Business Service Assistant (Specialist) and the duties and responsibilities of this class were substantially included in the existing class of Management Services Technician:
Therefore be it

RESOLVED, That any person with civil service status in the class of Management Services Technician on ----- holding a position or who, within a period of one year from the date of Board action is assigned a position which is classified in the class of Business Service Assistant (Specialist) shall be deemed to have the same civil service status in that class without further examination; and be it further

RESOLVED, That any existing employment lists other than reemployment lists established for the class of Management Services Technician shall be used to certify to fill vacancies in the class of Business Service Assistant (Specialist) until such lists are abolished, exhausted, or superseded by lists for the class of Business Service Assistant (Specialist), and any persons on existing reemployment lists for the class of Management Services Technician shall also be placed on reemployment lists for the class of Business Service Assistant (Specialist) until the expiration of their eligibility on the reemployment lists for the class of Management Services Technician.

C. WHEREAS State Personnel Board Rule 431 states, "Unless otherwise provided by resolution of the board, the maximum rate of the lowest salary range currently authorized for a class is used to make salary comparisons"; and

WHEREAS salary ranges within the new class of Business Service Assistant (Specialist) are being established to replace those of the previously existing classes of Business Service Assistant and Business Management Trainee; and

WHEREAS in establishing this new class the Board does not wish to change or disrupt the discretionary movement of employees to or from the various levels within the class: Therefore be it

RESOLVED, That each salary range in the class of Business Service Assistant (Specialist) may be used individually as if each represented the

salary range of a separate class to make salary comparisons for discretionary actions between the class of Business Service Assistant (Specialist) and other classes; and be further

RESOLVED, That for the class of Business Service Assistant (Specialist) the maximum currently authorized for the highest range of the class shall be the salary range used to make salary comparisons for mandatory actions.

6. That the following classes be abolished:

Business Service Assistant
Business Management Trainee
Business Service Officer IV.

7. That all appointments to the following classes that require a probationary period and that are effective on or after _____ shall require service of a one-year probationary period before an employee may attain permanent status in the class.

Business Service Officer I (Supervisor)
Business Service Officer II (Supervisor)
Business Service Officer III

ALTERNATE RANGE CRITERIA 274

When the requirements for the particular criteria are met and upon recommendation of the appointment power, the employee shall receive a rate under the provisions of Section 599.676.

Range A. This range shall apply to incumbents who do not meet the criteria for payment in Range B or Range C.

Range B. This range shall apply to persons who have satisfactorily completed the equivalent of six months of experience performing the duties equivalent to Business Service Assistant (Specialist), Range A.

Range C. This range shall apply to persons who have satisfactorily completed the equivalent of one year of experience performing the duties equivalent to Business Service Assistant (Specialist), Range B, or Staff Services Analyst, Range A.

CALIFORNIA STATE PERSONNEL BOARD

Specification

BUSINESS SERVICE OFFICER
Series Specification
(Established _____)

SCOPE:

This series specification describes six business service classes used in State service.

Schem Code	Class Code	Class
KK63	4707	Business Service Assistant (Specialist)
KK61	4720	Business Service Officer I (Specialist)
KK62	4722	Business Service Officer I (Supervisor)
KK51	4970	Business Service Officer II (Specialist)
KK52	4973	Business Service Officer II (Supervisor)
KK40	4785	Business Service Officer III

DEFINITION OF SERIES:

This series specification describes the work performed by six professional classes used throughout State Service in a wide range of business service activities. Specialist positions within this series are nonsupervisory and typically perform the most complex professional business service work assigned to the specific level.

ENTRY LEVELS:

Entry into this series is typically from the Staff Services Analyst, Junior Staff Analyst, and Management Services Assistant classifications.

FACTORS AFFECTING POSITION ALLOCATION:

Variety and complexity of business service work performed including function(s) for which responsible; department size and geographic dispersment; level and type of supervision received; extent of authority to make commitments; extent of responsibility for decisions; consequence of errors; level and type of personal contacts required; and number, level and variety of staff supervised.

CLASS

DEFINITION OF LEVELS

Business Service Assistant
(Specialist)

This is the entry, developmental and first working level in the series. While in a trainee capacity, incumbents work under close supervision and learn to perform a variety of technical and analytical business service activities. As their skills and abilities develop, incumbents are expected to perform with increasing independence. Fully trained incumbents may, under supervision, independently perform technical

CLASS**DEFINITION OF LEVELS**

Business Service Assistant
(Specialist)
Contd.

business service work of a routine nature in a variety of functions; assist in the performance of more difficult and complex technical and analytical business service work; or be assigned responsibility for one or more of the least complex business service functions which are Equipment and Supplies Management, Support Services and Building Maintenance. (Analytical business service work performed at this level is described as that which would otherwise be appropriate for a Management Services Technician.)

Positions at this level are non-supervisory but may serve as lead over lower level clerical and other staff. Positions are permanently allocated to this class when the major portion of the duties do not include independent responsibility for the more difficult and complex assignments found in the full working level.

Business Service Officer I
(Specialist)

Under general supervision, incumbents may independently perform technical and, for less than 50% of the time, analytical business service work of average difficulty in a variety of functions; assist in the performance of the most difficult and complex business service work; or be assigned responsibility for one or more functions of average difficulty. Functions of average difficulty are Purchasing, Facilities Management, Capitol Outlay and Telecommunications. (Analytical work of average difficulty is described as that which would otherwise be appropriate for a Staff Services Analyst.)

Incumbents are non-supervisory but may serve as lead over lower level staff. With an appropriate restructuring of duties, positions allocated to this class may be downgraded to Business Service Assistant (Specialist) for recruitment purposes.

Business Service Officer I
(Supervisor)

This is the first supervisory level in the series. Under general supervision, incumbents typically have full supervisory responsibility for approximately 3-6 lower level staff in a business service shop which may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

CLASS

DEFINITION OF LEVELS

Business Service Officer I
(Supervisor)
Contd.

Typically, incumbents either (1) supervise all business service functions in the smallest business service shops and personally perform the most difficult and complex technical and analytical business service work; or (2) in larger shops, supervise one or more business service functions of average difficulty or two or more functions of least complexity as assistant to a higher level Business Service Officer and assist with the performance of more difficult and complex business service work.

Business Service Officer II
(Specialist)

Under direction, incumbents either (1) perform the most difficult and complex technical work of a business service nature in a wide variety of functions; or (2) are assigned responsibility for one or more of the most difficult and complex technical functions which are Facilities Planning and Acquisition and Contracts. In addition, incumbents may also be assigned responsibility to complete special analytical studies for less than 50% of the time. (The level of analytical work performed is described as that which would otherwise be appropriate for an Associate Management Analyst.)

Positions are non-supervisory but may serve as lead over lower level staff.

Business Service Officer II
(Supervisor)

Under direction, incumbents either (1) supervise all of the business service functions of a small to medium sized business service shop and personally perform the most difficult and complex technical and analytical work; or (2) in larger shops, supervise two or more business service functions of average difficulty or one or more of the most complex functions as assistant to the business service shop manager and assist with the performance of other difficult and complex work.

Incumbents typically directly supervise 7-12 staff of which one or more are Business Service Assistant (Specialist) or Business Service Officer I (either Specialist or Supervisor). Other classes supervised may include general clericals, Materials and Stores Supervisors, Property Controllers, Mailing Machine Operators, and Stock Clerks.

CLASS**DEFINITION OF LEVELS**

Business Service Officer III Under direction, incumbents typically supervise (1) all business service functions in a medium to large sized business service shop; or (2) in larger shops, two or more of the most complex functions. In addition, incumbents may personally perform technical or analytical business service work of highest complexity.

Typically incumbents are second or third level supervisor over 13-20 staff with at least 6 subordinate Business Service Officers.

CLASS**MINIMUM QUALIFICATIONS**

Business Service Assistant
(Specialist)

Either I

One year of experience in the California State service performing duties comparable to those of an Office Assistant II (General) or Management Services Assistant.

Or II

One year of experience in a technical capacity with responsibility for one or a combination of business service activities such as accountability and maintenance of office and industrial equipment, major building maintenance, managing of major commercial properties; or fiscal management and accountability of office and industrial property. (Experience in California State service applied toward this requirement must include one year performing the duties of a class comparable to Office Assistant II - General.)

Business Service Officer I
(Specialist)
and
Business Service Officer I
(Supervisor)

Either I

One year of experience in the California State service performing duties comparable to those of a Business Service Assistant (Specialist) Range C or of a Staff Services Analyst, Range B or Junior Staff Analyst, Range B in a business service assignment. (Applicants who have completed six months of service performing the duties listed above will be admitted to the examination but must satisfactorily complete one year

<u>CLASS</u>	<u>MINIMUM QUALIFICATIONS</u>
Business Service Officer I (Specialist) and Business Service Officer I (Supervisor) Contd.	<p>of experience performing these duties before they can be considered eligible for appointment.)</p> <p style="text-align: center;"><u>Or II</u></p> <p><u>Experience:</u> One year of technical experience beyond the Trainee level in one or a combination of the following:</p> <ol style="list-style-type: none"> 1. Equipment and supplies management including the preparation of purchase documents; <u>or</u> 2. Building management including lease negotiation and problem resolution; <u>or</u> 3. Telecommunications including landwire and radio/microwave. <p>(Experience in California state service applied toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Assistant (Specialist) Range C. <u>and</u></p> <p><u>Education:</u> Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)</p>

BUSINESS SERVICE OFFICER II (SPECIALIST) and BUSINESS SERVICE OFFICER II (SUPERVISOR)	<p style="text-align: center;"><u>Either I</u></p> <p>One year of experience in the California State service performing the duties of a Business Service Officer I (Specialist) or (Supervisor), Procurement and Services Officer I, Hospital General Services Administrator I, or of a Staff Services Analyst, Range C in a business service assignment.</p> <p style="text-align: center;"><u>Or II</u></p> <p><u>Experience:</u> Two years of technical experience beyond the Trainee level in one or a combination of the following:</p> <ol style="list-style-type: none"> 1. Negotiation of commercial, industrial, or office leases for buildings; <u>or</u> 2. Management of industrial or office buildings with responsibility for maintenance, repairs, equipment and service; <u>or</u> 3. Preparation of working plans and technical specifications, and solicitation and awarding of bids for alterations to, construction or purchase of commercial, industrial, or office buildings or major equipment; <u>or</u> 4. Business service contract management and oversight. <p>(Experience in California state service applied</p>
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CLASS	MINIMUM QUALIFICATIONS
Business Service Officer II (Specialist) and Business Service Officer II (Supervisor) Contd.	toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer I (Specialist or Supervisor).) <u>and</u> <u>Education:</u> Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

BUSINESS SERVICE OFFICER III	<p style="text-align: center;"><u>Either I</u></p> <p>One year of experience in the California State service performing the duties of a Business Service Officer II (Specialist) or (Supervisor), or Procurement and Services Officer II;</p> <p style="text-align: center;"><u>Or II</u></p> <p>Two years of experience in the California State service performing the duties of a Business Services Officer I (Specialist) or (Supervisor), Procurement and Services Officer I, or Hospital General Services Administrator I.</p> <p style="text-align: center;"><u>Or III</u></p> <p><u>Experience:</u> Three years of progressively responsible and varied experience in the business service field in a public or private organization, at least one year of which must have been in a supervisory capacity. (Experience in California State service applied toward this requirement must include one year performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer II (Specialist) or (Supervisor) or two years performing the duties of a class at a level of responsibility equivalent to that of a Business Service Officer I (Specialist) or (Supervisor).) <u>and</u> <u>Education:</u> Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)</p>
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CLASS	KNOWLEDGES AND ABILITIES
BUSINESS SERVICE ASSISTANT (SPECIALIST)	<p><u>Knowledge of:</u> English grammar and punctuation; principles and practices of public administration; financial record keeping; and office and automotive equipment and supplies.</p> <p><u>Ability to:</u> Communicate effectively; learn rapidly; follow directions; analyze data accurately; reason logically; maintain the</p>

CLASS

KNOWLEDGES AND ABILITIES Contd.

BUSINESS SERVICE ASSISTANT
(SPECIALIST)
(contd)

confidence and cooperation of those contacted during the course of work; and utilize good work habits.

BUSINESS SERVICE OFFICER I
(SPECIALIST)
AND
BUSINESS SERVICE OFFICER II
(SPECIALIST)

Knowledge of: All of the above and bases for property values and the legal forms, procedures and requirements necessary in property transactions; building management including office layout, lighting, heating and ventilation.

Ability to: All of the above and write specifications and determine whether incoming materials, supplies and equipment meet the standards set up in these specifications; utilize office and automotive equipment and supplies effectively and economically; prepare rough sketches of proposed alterations and repairs to premises and estimate costs; inspect miscellaneous properties and equipment and correctly report their condition and recommend replacements; plan and direct the work of others; successfully negotiate agreements for office space, equipment, supplies and services; prepare budgetary data on such needs; and analyze situations and problems accurately and take an effective course of action.

BUSINESS SERVICE OFFICER I
(SUPERVISOR)
BUSINESS SERVICE OFFICER II
(SUPERVISOR)
BUSINESS SERVICE OFFICER III

Knowledge of: All of the above and personnel management and supervision; the department's affirmative action program objectives; a supervisor's role in the affirmative action program and the processes available to meet those objectives.

Ability to: All of the above and estimate future needs and cost of equipment, supplies and services and prepare budgetary data on such needs; and effectively contribute to the department's affirmative action program.

CLASS HISTORY

	Date Established	Date Revised	Title Changed
Business Service Assistant (Specialist)	-----	-----	-----
Business Service Officer I (Specialist)	3/28/46	-----	11/ 7/84
Business Service Officer I (Supervisor)	3/28/46	-----	11/ 7/84
Business Service Officer II (Specialist)	10/17/52	-----	11/ 7/84
Business Service Officer II (Supervisor)	10/17/52	-----	11/ 7/84
Business Service Officer III	3/28/46	-----	10/17/52

C A L I F O R N I A S T A T E P E R S O N N E L B O A R D

SPECIFICATION

Schematic Code: KK75
Class Code: 4742
Established: 4/21/76
Revised: 7/11/79
Title Changed: --

ASSOCIATE BUSINESS MANAGEMENT ANALYST

DEFINITION

Under direction, to perform independently the more difficult, responsible and complex technical and analytical work in the business and administrative services area; to act as leadperson for lower level business services staff; and to do other related work.

JOB CHARACTERISTICS

This class is differentiated from the Business Service Officer series in that the duties and responsibilities include no less than 51% Associate level analytical duties relating to budgeting, management and administrative analysis in addition to technical knowledge of business services functions.

TYPICAL TASKS

Analyzes and makes recommendations upon varied management problems involved in directing business services activities; analyzes and develops the budgetary program and coordinates the preparation phases of the nonpersonnel services

budget; develops and improves programs for the effective procurement and utilization of office space, communications systems, forms, supplies, equipment, and other property; evaluates and makes recommendations on requests for purchases of major items of new property or repair of existing property; prepares plans and specifications for building repair or alteration; negotiates contracts and leases for services and repairs; inspects and recommends acceptance of contracted building work; controls and reviews the processing of all departmental contracts including line program contracts; establishes and operates a training program for lower level analysts; makes special administrative or research studies and recommends installation of new methods and procedures; prepares analysis of proposed legislation; conducts feasibility studies and systems analysis; prepares and revises rules and manuals of procedure; performs continuing studies in records management; prepares reports; and dictates correspondence.

MINIMUM QUALIFICATIONS

Either I

Six months of experience performing the duties of a Business Service

Officer II (Specialist or Supervisor).

Or II

One year of experience performing the duties of (1) a Staff Services Analyst, Range C, or (2) a Business Service Officer I. (Persons applying experience

toward this pattern must have had a full-time assignment in California state service performing technical business services work.)

Or III

Three years of progressively responsible analytical experience above the Trainee level in business or administrative services, budget, or management systems analysis, one year of which shall have included responsibility for conducting detailed analysis requiring the preparation and submission of findings with recommendations. (Experience in the California state service applied toward this requirement must include one year performing analytical duties of a class comparable in level of responsibility to that of Staff Services Analyst, Range C.)

(Promotional candidates who are within six months of satisfying the experience requirement for this class will be admitted to the examination, but they must fully meet the experience requirement before being eligible for appointment.)

KNOWLEDGE AND ABILITIES

Knowledge of: Analysis methods; principles and practices of governmental budgeting; principles of public and business administration; principles of organization and management; principles and practices of policy formulation, property acquisition and management, contract administration, specification writing, financial record keeping, office layout, purchasing, building management, and personnel management and supervision.

Ability to: Analyze situations and problems accurately and take effective course of action; establish and maintain effective working relations with those contacted in the course of the work; speak and write effectively; interpret and apply laws, rules, standards, and procedures; successfully negotiate agreements; estimate future needs and cost of equipment, supplies and services, and prepare budgetary data on such needs; plan and direct the work of others.

CALIFORNIA STATE PERSONNEL BOARD

specification

SCHEMATIC CODE: LE61
CLASS CODE: 5278
ESTABLISHED: 6/8/77
REVISED: 1/23/79
TITLE CHANGED: --

MANAGEMENT SERVICES TECHNICIAN

Definition:

Under supervision, to learn and perform the less technical, semi-professional tasks of a management services or related discipline, either (1) on a permanent basis, or (2) in training in preparation for promotion to the professional level; and other duties as required.

Typical Tasks:

In Business Services: gathers and analyzes technical information on equipment and material, and prepares the most routine technical equipment and material contracts.

In Employment Relations: researches, gathers, and analyzes information for use in investigations and in adjusting complaints; may prepare reports.

In Tax Compliance: performs the most routine work of tax law enforcement.

In Budgeting, Auditing or Management Analysis: prepares less difficult budgeting, auditing, technical, or related reports, and may be responsible for an assigned routine segment of budgeting, auditing or related work.

In Data Processing: performs the less difficult systems analysis and may be assigned a routine segment of systems analysis.

In Accounting: takes corrective action on balance reports and may maintain less complex accounting records.

In Program Analysis: performs the less complex gathering and analysis of program information.

Minimum Qualifications:

Either I

One year of experience performing the duties of a Management Services Assistant. (Applicants who have completed six months of service performing the duties as specified above will be admitted to the examination, but they must complete one year of this experience before they can be eligible for appointment.)

Or II

One year of experience in the California state service performing duties at a level of responsibility equivalent to that of Office Assistant II (General).

Or III

Sixty semester or 90 quarter units of college.

and

Knowledges and abilities:

Knowledge of: arithmetic, spelling, grammar, punctuation, and modern English usage.

Ability to: learn rapidly; follow directions; communicate effectively with other staff and those contacted in the work; use good work habits such as punctuality, skill, neatness and dependability; make satisfactory progress in a prescribed training program; interpret written material; edit written material; write effectively; analyze written and numerical data accurately; make clear, concise oral presentations.

and

Special and personal characteristics: Both demonstrated interest in and aptitude for work in one of the staff services or related disciplines, and the capacity for professional development.

Desirable Qualifications:

Experience and/or education applied toward Patterns I and II which has developed verbal, analytical, numerical, and/or writing skills is preferable.

ALLOCATION GUIDELINES FOR BUSINESS SERVICE POSITIONS

A. Introduction to the Allocation Guidelines

These guidelines supersede all previous guidelines issued for the following classes:

Business Service Assistant (Specialist)
Business Service Officer I (Specialist)
Business Service Officer I (Supervisor)
Business Service Officer II (Specialist)
Business Service Officer II (Supervisor)
Business Service Officer III
Associate Business Management Analyst
Staff Services Manager I (only in Business Service shops)

The following guidelines are not absolutes. They should be used as indicators for determining the appropriate allocation of positions. They are provided to assure consistency in the use of these classes in all departmental business service shops. They are also intended to supplement and clarify the standards in the Business Service Officer series specification and the class specifications for Associate Business Management Analyst and Staff Services Manager I.

As with all positions, those in a business service shop should not be looked at in isolation. The level of their allocation could be positively or adversely impacted by a variety of factors. To name but a few - organization placement; delegated authority from a Control Agency or department manager; variety, mix, number and geographic location of professional or other staff for which responsible as lead or supervisor; and the authority and responsibility assigned or delegated to other staff in or outside of the department which relates to accomplishment of your position's duties and responsibilities.

B. Content and Use of the Guidelines:

1. General Information

The following guidelines should be used in conjunction with the allocation standards shown in the ABMA class specification and the BSO series specification. The criteria for allocating SSM positions in a business service shop are contained in their entirety in this document.

The following guidelines contain descriptions of Independence of Action, Typical Tasks/Scope of Responsibility and Variety and Complexity of Duties. Within the Variety and Complexity of Duties section is defined the complexity level of FUNCTIONS performed in

business service shops as well as the complexity level of the FACTORS (i.e. duties and responsibilities) inherent within each function.

When using these guidelines, be aware that the complexity level of the FUNCTIONS assigned to a position is typically more important to the position's allocation than the complexity level of the factors within the Function. For example, a position which is assigned all average Functions is typically more complex than a position which is assigned only the least complex Functions regardless of the complexity level of the factors they each perform. You should also be aware that the "Typical Duties" described for each level and class are not all inclusive; an incumbent may perform all or only a segment of those types of duties, depending upon the organization structure of the business service office.

2. Allocation Worksheet

Attached to these guidelines is an Allocation Worksheet. Use these guidelines to complete a copy of the attached worksheet in order to graphically display the position's strengths and weaknesses and determine the complexity of its assigned duties and responsibilities. A worksheet should be completed for each business service position in any of the classes identified above in Section A. prior to the Personnel Office approving its being filled, refilled or reclassified. (Copies of the blank worksheet should be xeroxed as needed.) Personnel Office approval is indicated by the signature of an authorized person on the completed worksheet. Completed worksheets should be retained by departments for audit purposes and a copy should also be attached to all Forms 625 sent to DPA.

3. Unusually Complex Assignments

Occasionally, a Function or assignment will be so unusually complex and difficult as to seem to require a higher level allocation than would normally be warranted based upon information in the class specification or the following guidelines. The circumstances and impact of these unusually complex assignments should be documented in the Mitigating Factors section of the attached worksheet. The appropriate allocation of such positions will be resolved on a case by case basis between the Department and the DPA analyst assigned to the Department.

4. General Allocation Process

There are 2 basic approaches to allocating business service positions:

- . Based on supervisory responsibilities as described in the class specifications; and

- . Based on scope and complexity of assignments as described in the class specifications AND defined in the attached guidelines.

5. Steps for allocating business service positions.

- a. Determine if the position is a Supervisor or Specialist.
- b. Complete the worksheet (See pages _____ and the class specification for a description of the Functions and complexity factors).
- c. Identify the Functions for which personally responsible (to be considered separately from the Functions which it may supervise); AND, by completing the worksheet,
- d. Determine the complexity of the specialist duties it personally is assigned. If the position also has lead responsibility for other staff, identify the number and level of staff for which it has lead responsibility and the specific lead duties it performs.
- e. In addition, for all supervisory positions, identify the Functions which the position supervises as well as the number and level of staff it supervises.
- f. Using the information on the worksheet, compare the position's duties and responsibilities against the class specification and the attached guidelines to determine the appropriate level.

6. Associate Business Management Analyst Allocations

The criteria for allocating these positions are contained solely in the class specification.

7. Staff Services Manager I Allocations

Staff Services Manager I positions are typically found only in the very largest centralized business service shops. These assignments are typically administrative in nature as opposed to being technically oriented. As such, an SSM I would be expected to be involved in the policy formulation and long term planning activities of ALL business service Functions and to plan, organize and direct a very large and varied staff of 25 or more positions of which at least 6 are professional allocations.

In a Department with an exceptionally complex and large business service program, an SSM I may be assigned responsibility for a single function PROVIDED ALL OF THE FOLLOWING CRITERIA ARE MET:

- . The Function is one of the most complex and difficult; AND

- . The position has statewide responsibility and authority for a centralized Function; AND
- . Decisions made by the position and/or its staff have significant impact upon exceptionally large numbers of offices which are widely dispersed throughout the State; AND
- . The position supervises a large staff with typically no fewer than 20 total employees of which at least six are at or above the Business Service Officer II level.

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

BUSINESS SERVICE ASSISTANT
(SPECIALIST)

BUSINESS SERVICE OFFICER I
(SPEC. AND SUPV.)

BUSINESS SERVICE OFFICER II
(SPEC. AND SUPV.)

BUSINESS SERVICE OFFICER III

INDEPENDENCE OF ACTION

Limited. Positions are typically guided by detailed and specific instructions. Typically, decisions are closely reviewed.

Average. Assignments are frequently routine and unusual assignments are closely reviewed. Instruction is typically in the form of specific written or verbal guidelines and interpretations. Decisions for both technical and analytical work which go beyond established procedures typically require higher level review/approval.

Above average. Decisions are not closely or routinely reviewed. Analytical work however routinely requires higher level review and approval. Instruction received is typically general written or verbal guidelines.

Considerable. Decisions at this level rarely receive higher level review or approval unless there are major policy implications. Instruction received is typically in the form of policy guidance.

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

BUSINESS SERVICE ASSISTANT
(SPECIALIST)

BUSINESS SERVICE OFFICER I
(SPEC. AND SUPV.)

BUSINESS SERVICE OFFICER II
(SPEC. AND SUPV.)

BUSINESS SERVICE OFFICER III

TYPICAL TASKS/SCOPE OF RESPONSIBILITY

Learns to perform activities in a wide variety of business service functions by following detailed and specific instructions. Learns how to determine the data needed for individual Functions, where and how to obtain the data, how to format and assemble data, how to obtain the needed approvals and signatures, how and when to implement the desired course(s) of action and monitor the results.

When fully trained, may be assigned independent or lead responsibility to initiate, implement and monitor activities associated with one or more of the least complex Functions and may also assist in the performance of more difficult and complex work.

Assigned tasks are typically repetitive and easily learned within the probationary period.

Analytical work typically is less than 50% of the duties.

The Supervisor class does both supervisory and non-supervisory work. The Specialist class has only non-supervisory duties which may include being lead over lower level staff.

Non-supervisory work typically includes the following elements relative to one or more Functions of average complexity: define problem areas, develop project plans for resolving identified issues, identify alternatives and recommend alternative course(s) of action and monitor the results.

Analytical work performed is typically less than 50% of the duties.

Same as for the BSO I classes except typically performs duties relative to the most complex and difficult Functions.

Typically does all that is required to manage a medium to large office and/or a large multi-discipline staff.

If not the highest level manager in the shop, may have independent responsibility to define problem areas, develop project plans for resolving identified issues, identify alternatives and recommend solutions, implement desired courses of action and monitor the results for one or more functions of highest complexity and difficulty. If not the highest level manager in the shop, these non-supervisory duties should be in addition to the supervisory duties required for the level and typically for functions for which the position does not have supervisory responsibility.

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

VARIETY AND COMPLEXITY OF DUTIES
(AKA Business Service Functions and Factors Affecting Their Complexity)

A. Applicable to all positions in all classes:

1. Span of Control/Scope of Responsibility

- a. Local, typically with one building or warehouse or one building and one satellite office - Least Complex
- b. Regional, typically with one or two buildings and two or more satellite offices or two warehouses - Average Complex
- c. Statewide, typically with two or three buildings and two or more satellite offices or three warehouses - Most complex.

2. Building Ownership - Primarily impacts Functions of: Equipment and Supplies Management; Building Management; Capital Outlay; Telecommunications; Facilities Management; Facilities Planning and Acquisition; and Contracts.

- a. State (DGS) - Least Complex
- b. Department - Average Complex
- c. Private (Leased) - Most Complex

B. Specific Functions for which individual positions may be responsible

1. EQUIPMENT AND SUPPLIES MANAGEMENT - One of three LEAST complex functions.

Factor A - Number and geographic proximity of warehouse being supplied:

- a. 1 - Least Complex
- b. 2, regardless of geographic proximity - Average Complex
- c. 3, at least one warehouse not in close proximity - Most Complex

Factor B - Level of inventory control required

- a. Property Controller level - Least Complex
- b. Property Inspector level - Average Complex
- c. Property Inspector level with unusually complex controls required (i.e. police or fire equipment and supplies) - Most Complex.

Factor C - Disposition of equipment and supplies

- a. Destroy and/or have Department of General Services handle - Least Complex
- b. Inventory, prepare items for sale or auction, solicit bids, select bidder, and arrange for pick up or delivery of surplus equipment - Average to High Complex
- c. All of item b. above and including vehicles or other heavy equipment - Most Complex

2. SUPPORT SERVICES - One of three LEAST complex Functions

Factor A - Variety of Support Services for which responsible as supervisor or lead. Support Services include the following services: Mail; Duplicating; Warehouse; Stockroom; Motorpool; and Administrative Support (AKA clerical support).

- a. 1-2 services - Least Complex
- b. 3-4 services - Average Complex
- c. 5 or more services - Most Complex

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

VARIETY AND COMPLEXITY OF DUTIES
(AKA Business Service Functions and Factors Affecting Their Complexity)
(Contd)

Factor B - Extent of authority to expend funds and reallocate resources between the support services for which responsible.

- a. All except minor adjustments to meet temporary emergency situations require prior review and approval by higher authority - Least Complex
- b. Delegated authority to spend a limited amount of funds and shift staff resources based on established and well defined standards - Average Complex
- c. Delegated authority, within general guidelines, to determine the need for and to spend funds or shift staff and/or equipment resources to meet operating needs without prior supervisory approval - Most Complex.

3. BUILDING MANAGEMENT - (AKA Building Maintenance) - one of three LEAST complex Functions

Factor A - Extent of authority and responsibility

- a. Primarily coordinator between building manager and occupants - Least Complex
- b. Coordinate project's accomplishment between DGS, occupants and maintenance personnel; oversee performance of work being done; identify and locate on floor plans items requiring repair or alterations - Average Complex
- c. All of the above AND negotiate problem resolution with lessor as to lease interpretation, responsibilities and obligations; read floor plans to determine consistency with lease requirements - Most Complex.

4. CAPITOL OUTLAY - one of four AVERAGE complex Functions

Factor A - Type of project as primarily determined by DGS guidelines in the State Administrative Manual.

- a. Typically has only minor projects such as alterations and/or repairs to existing structures - Least Complex
- b. The majority of projects are classified as minor but occasionally (perhaps one or two a year) will have a project classified as major - Average Complex
- c. Major projects are a frequent occurrence (more than three a year); OR a project is unusually large and complex and expected to take more than one to two years to complete; OR an unusually large amount of authority and responsibility is delegated to the Department by DGS - Most Complex

Factor B - Extent of responsibility for preparing plans and specifications

- a. Prepare rough sketches and estimates based primarily upon past practices. This may or may not include a written report of alternatives and recommendations - Least Complex
- b. Prepare detailed sketches and estimates including preparation of a written report of alternatives and recommendations indicating research into potential and real cost increases or overrides, impacted Department goals or issues which may be created or resolved, as well as past practices - Average Complex.
- c. Prepare detailed sketches, estimates and reports as above but also includes significant research, creative developmental work and at least a minimum of delegated decision making authority to effectively select an appropriate course of action - Most Complex.

5. PURCHASING - one of four AVERAGE complex Functions

Factor A - Extent of authorization to prepare/approve documents

- a. Prepare/review documents according to specific guidelines/instructions - Least Complex
- b. Based on general guidelines, determine appropriate data and format required, develop justifications to support, recommend approval/denial to DGS or higher level BSO or Manager, may have authorization to approve or deny standard or repetitive purchase requests - Average Complex

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

VARIETY AND COMPLEXITY OF DUTIES
(AKA Business Service Functions and Factors Affecting Their Complexity)
(Contd)

- c. All of the above and negotiate problem resolution between vendors, users and DGS; authorization to approve/deny most, if not all, purchase requests including the specifications developed for items to be purchased - Most Complex

Factor B - Variety and type of purchases for which responsible.

- a. Office equipment and supplies - Least Complex
- b. Non office equipment and supplies including but not limited to road materials, heavy equipment and vehicles - Average Complex
- c. EDP, police and fire equipment requiring special handling - Most Complex

Factor C - Dollar amount of purchase delegation which authorized to approve/sign

- a. Less than that delegated to Department from DGS - Least Complex
- b. Equal to that delegated to Department from DGS - Average Complex
- c. Above that typically delegated to departments from DGS - Most Complex

6. TELECOMMUNICATIONS - One of four AVERAGE complex Functions. (NOTE: Existence of Telecommunication Analysts or Managers in the Department REDUCES the complexity of this Function to LEAST COMPLEX for BSO allocations.)

Factor A - Number, variety and location of telecommunication systems for which responsible

- a. Landwire systems only located in 1 or more facilities or sites - Least Complex
- b. Both Landwire and Radio/Microwave systems located in 1 or more facilities or sites - Average Complex
- c. Primarily Radio/Microwave systems located in more than 3 facilities or sites - Most Complex

Factor B - Extent of authority and responsibility

- a. Primarily a coordinating role - Least Complex
- b. Determine user needs, select or recommend appropriate equipment, oversee installation and resolve problems - Average Complex
- c. Develop detailed system design, select site locations outside of the normal office complex, perform propagation surveys, coverage calculations and systems evaluations - Most Complex

7. FACILITIES MANAGEMENT - one of four AVERAGE complex Functions

Factor A - Extent of decision making and signature authority

- a. Refer decisions and documents requiring signature to higher level - Least Complex
- b. No discretion to exceed limits imposed by specific, detailed guidelines - Average Complex
- c. Has authority to interpret limits imposed by general guidelines - Most Complex

Factor B - Extent of delegation (real or effective) from OREDS

- a. Less than what is typically delegated to other departments - Least Complex
- b. Typical of what is delegated to other departments - Average Complex
- c. Exceeds what is typically delegated to other departments - Most Complex

Factor C - Extent of responsibility to prepare specifications and frequency with which exercised.

- a. According to specific and detailed instruction, either on a regular basis or infrequently, assemble the data provided by other into the proper format and style for a specification - Least Complex

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

VARIETY AND COMPLEXITY OF DUTIES
(AKA Business Service Functions and Factors Affecting Their Complexity)
(Contd)

- b. According to general guidelines, on a regular basis, gather and evaluate data to determine the appropriateness and relevancy of specifications prepared by others and use as the basis for recommending approval or denial - Average Complex
 - c. According to general direction, and on a regular basis, personally develop the specification and justification by determining the appropriate and relevant information needed to include in the specification to obtain the result desired of the item by the user - Most Complex
8. SPECIAL ADMINISTRATIVE STUDIES - One of three MOST complex Functions. (NOTE: If the work is primarily procedures development, it is NOT considered to be a special administrative study for purposes of BSO allocations.)

Factor A - Extent to which duties performed meet the following criteria:

- a. Least Complex - Accumulates information or data according to generally established criteria from source documents or persons, restructures or combines information into new information useful for decision making, write narrative descriptions of the information and apply the information to established criteria to develop recommendations or approve actions in accordance with established standards.
- b. Average Complex - In addition to performing the least complex analytical work, duties also involve substantial responsibility for problem definition, development of unique project plans, identification of alternative solutions, implementation of desired courses of action and monitoring the results. Developing legislative bill analysis is considered analytical work of average complexity.
- c. Most Complex - In addition to performing analytical duties of average complexity, duties also involve independent or lead responsibility for one or more of the following:

Conducting or coordinating a project to develop and recommend to management business service policy (not procedures) which would apply statewide to the entire department.

Providing total program evaluation or audits of the department's entire business service program.

Developing new program models, systems or evaluation tools on a statewide or department wide basis or as pilot projects with intent to use on a statewide or department wide basis.

Developing proposed legislation; or legislative bill analysis which includes maintaining contact with staff of the Legislature.

Developing program analysis methods, management information systems, and planning systems.

Providing total program evaluation of a most complex or unusually difficult business service function.

9. CONTRACTS - One of three MOST complex Functions

Factor A - Type(s) of contracts and extent of involvement in contract development.

- a. Routine (for either the State or the department) type of contract with standard language, criteria and format determined primarily by the Department of General Services and/or past practice; typically involves standard processing and little, if any, creative or innovative development - Least Complex

BUSINESS SERVICE POSITION ALLOCATION GUIDELINES
(Contd)

VARIETY AND COMPLEXITY OF DUTIES
(AKA Business Service Functions and Factors Affecting Their Complexity)
(Contd)

- b. Contracts involve significant responsibility for problem identification and resolution including the creation of justification statements and for monitoring contractor compliance - Average Complex
- c. All of the above and also develop new or revised policy and standards applicable to contracts and determine the impact of new or revised legislation on contracts within the department - Most Complex

Factor B - Variety of Contracts

- a. Routine contracts, usually 1 or 2 different types - Least Complex
- b. All but the most complex Contracts, usually 3 or 4 different types - Average Complex
- c. All types of contracts including EDP - Most Complex

Factor C - Decision Making Authority For All Contracts For Which Responsible

- a. Approves or denies contracts based upon specific, established guidelines and standards - Least Complex
- b. All of the above and also authorized to negotiate, as directed, terms or conditions of the contracts - Average Complex
- c. All of the above and also authorized to monitor Contractor performance and report deficiencies or problems to the appropriate control agency - Most Complex

Factor D - Level and Sensitivity of Public Contact

- a. Typical for the type of contract - Least Complex
- b. Legislative or Press interest possible even if not probable - Average Complex
- c. Legislative or Press interest highly likely - Most Complex

10. FACILITIES PLANNING AND ACQUISITION - One of three MOST complex functions (NOTE: If work is primarily done by the Department of General Services, the work done by department staff is considered Facilities Management NOT Facilities Planning and Acquisition.)

Factor A - Responsibility to plan and design offices

- a. Review requests for additional space, determine feasibility and recommend approval/denial and most effective and efficient method to accomplish - Least Complex
- b. Identify and recommend future space needs; plan and budget for their accomplishment; prepare "to scale" drawings; and, if needed, negotiate leases for office space - Average Complex
- c. In addition to the above, perform area and site searches, effectively contribute to selection of the most appropriate areas and site, coordinate completion of required construction or building alterations and actual occupancy of the building; may have substantial delegation from Office of Real Estate Development - Most Complex

Factor B - Responsibility for Budget preparation

- a. Based upon past practice, gather and/or provide specific data requested - Least Complex
- b. Develop short range plans (2 - 4 years) including determine budget requirements and gather/provide data needed to support recommendations - Average Complex
- c. Develop long range plans (5 years) including determine budget requirements, gather data to support and effectively negotiate budget approval - Most Complex