

# Generalist Glossary

Terms	Definitions
<b>Administrative Responsibility (Manager I/II)</b>	The authority and obligation to develop and implement policies and procedures; manage budgets, contracts, and other resources; ensure compliance with laws, regulations, and departmental standards; provide oversight of staff and program activities; and report on performance, outcomes, and operational effectiveness. Key elements may include budget development and oversight, personnel management and staffing decisions, contract and procurement administration, policy and procedure development, operational planning, and reporting. Administrative responsibility is distinguished from routine supervisory duties by its scope, level of authority, and accountability for program or organizational outcomes, and is typically assigned to individuals in higher supervisory and managerial roles.
<b>Advanced Journey Level (Analyst III)</b>	At this level, the employee is recognized as a subject matter expert and performs complex or specialized assignments that require a high degree of expertise, independent judgment, and problem-solving. Incumbents at this level are fully proficient in all standard duties and are relied upon to independently resolve issues of significant scope and departmental impact within their area of specialization. Incumbents may serve as technical experts, lead workers, and/or mentors to other staff, providing guidance based on expertise rather than supervisory authority.
<b>Analytical (Analyst I/II/III/IV) (Supervisor I/II, and Manager I/II)</b>	Analytical work involves using critical thinking to define, understand, and address problems by reviewing, researching, and evaluating information from multiple sources and conducting analysis. This includes using quantitative and qualitative information to develop conclusions, options, or recommendations, and exercising judgment and discretion, especially when the answer isn't obvious (gray area) or where issues involve ambiguity.
<b>Classification</b>	<p>A classification is a group of positions that are sufficiently similar in duties and responsibilities that the same class title may reasonably and fairly be used to designate each position allocated to the class. Positions within a classification are also similar enough that substantially the same minimum qualifications, tests of fitness, and schedule of compensation may be applied with equity. (See <a href="#">CA Government Code section 18523.</a>)</p> <p>For allocation purposes, the classification must be based on the nature and level of the work to be performed by the position, and not the individual incumbent's experience, performance, or organizational placement.</p>

Terms	Definitions
<p><b>Classification Series</b></p>	<p>A "classification series" is a vertically related group of classes covering the same occupational specialty and program area that together constitute a primary promotional pattern for a specifically identifiable group of employees. (See <a href="#">California Code of Regulations title 2, section 75.1.</a>)</p> <p>For allocation purposes, positions within a classification series are differentiated by progressive differences in complexity, scope of responsibility, independence, and impact, rather than by differences in the basic type of work performed.</p>
<p><b>Clerical (Analyst I/II/III/IV) (Supervisor I/II, and Manager I/II)</b></p>	<p>A range of primarily non-analytical, standardized, procedural, and office support tasks performed to keep an office organized and operating smoothly. Incumbents in clerical positions perform routine office tasks such as answering phones, sorting and distributing mail, ordering and maintaining office equipment, managing office supplies, typing, filing, scheduling, and assisting with paperwork, forms, and records. Clerical staff also provide customer service and administrative support to staff, programs, managers, and the public.</p> <p>For allocation purposes, clerical work may involve judgment and review within established procedures, but is distinguished from analytical work by the absence of responsibility for independently analyzing ambiguous issues, exercising professional judgment where procedures do not provide the answer, or developing recommendations.</p>
<p><b>Confidential Designation</b></p>	<p>A confidential designation is a classification status assigned to positions or employees whose duties involve access to, or participation in, management decisions affecting employer-employee relations, including assisting in the development of management's negotiation proposals and investigating or responding to employee grievances. Whether a position is properly designated confidential is determined by the nature of the position's responsibilities in the employer-employee relations category, not by the individual incumbent.</p> <p>Pursuant to <a href="#">CA Government Code section 3513, subdivision (f)</a>, the definition of "confidential" does not include work involving information that must be kept confidential under privacy statutes, regulations, or departmental policies, such as personnel records, investigative data, or other privileged information unrelated to employer-employee relations. While such duties may involve confidential information, they do not meet the definition of a "confidential employee" under the Dills Act. Also see <a href="#">CalHR Manual section 2002 – Confidential Designations</a>.</p>

Terms	Definitions
<p><b>Consultative Services</b></p>	<p>Consultative services are professional or technical services provided by an employee who offers expert advice, guidance, or recommendations to management, staff, or external stakeholders. These services typically involve analyzing complex issues; developing, interpreting, and presenting ideas and solutions; interpreting policies, regulations, or research findings; and assisting in decision-making processes that may have significant impact. Employees providing consultative services are expected to possess subject matter expertise and the ability to communicate effectively with diverse audiences.</p> <p>For allocation purposes, consultative services are characterized by the exercise of independent judgment and professional analysis, rather than by the act of providing information, coordination, or support alone.</p>
<p><b>Customer Service (Analyst I/II/III/IV) (Supervisor I/II, and Manager I/II)</b></p>	<p>Customer service is the process of assisting customers by providing accurate information, guidance on next steps, and support in navigating services or procedures, whether in person, by phone, or through written communication. This may include responding to inquiries, resolving problems, offering alternatives, following up to ensure resolution, and collecting feedback. Customer service requires clear communication and a professional, patient approach. In technical or analytical roles, customer service may involve explaining or applying complex policies, procedures, or data.</p> <p>For allocation purposes, customer service alone does not constitute analytical work unless it includes responsibility for independently analyzing ambiguous issues or developing recommendations.</p>
<p><b>Deep Class</b></p>	<p>A deep Class is a single classification in which every position allocated to that classification may be assigned any duty within the class concept. Deep classes include alternate ranges in which employees gain status in each range, and each status range is considered a separate class for salary comparison purposes. (See <a href="#">California Code of Regulations title 2, section 425, subdivision (i).</a>)</p> <p>Advancement through the ranges generally occurs when the employee meets established criteria, such as satisfactory performance, licensure requirements, and/or time-in-range. Deep classes are designed to support career development without requiring a new examination or reclassification process. A deep class is distinguished from a non-deep class via footnote 21 in the pay scale.</p>

Terms	Definitions
<b>Department-Wide</b>	Department-wide refers to a scope of impact that extends across the entire department. Work at this level supports department-wide goals and may involve coordination across multiple divisions or program areas. This may include activities such as developing department-wide policies or leading projects that involve various/multiple program areas. Department-wide work supports and impacts the department's overall mission and objectives, rather than a single division, unit, or program.
<b>Direct Supervision</b>	Direct supervision is the ongoing responsibility for planning, assigning, reviewing, and evaluating the work of one or more subordinate employees. It includes exercising authority in personnel actions such as hiring, training, disciplining, and approving leave. Direct supervision involves responsibility not only for the work performed by subordinate employees but also for their performance and conduct. The degree of direct supervision may range from close and detailed oversight to more general direction, depending on the classification level and complexity of the duties performed.
<b>Division-Wide</b>	Division-wide refers to a scope of impact that is limited to multiple units, branches, or work groups within a single division. Work at this level affects activities, decisions, or communication across the division, but does not typically extend beyond the division or have a broader departmental impact.
<b>Expert</b>	<p>An expert is an individual with exceptional depth and breadth of knowledge, skills, abilities, and experience in a subject or specialty area. Experts are relied upon for their specialized understanding and ability to apply that expertise to complex issues and often provide advice or guidance to others within their area(s) of expertise.</p> <p>For allocation purposes, expert status is reflected not only by technical proficiency, but by the level of independence, scope of impact, and significance of the issues addressed, as described in the allocation factors.</p>
<b>Expert Journey Level (Analyst IV)</b>	The highest non-supervisory level within the Analytical classification series, where the incumbent is recognized as a subject matter expert and prime resource in a specialized area. Employees at this level perform the most complex, sensitive, and high-impact assignments and are relied upon for authoritative expertise, strategic insight, and independent judgment. Incumbents may lead major initiatives, develop policy or program recommendations, and provide high-level consultation to executives, program managers, or external stakeholders, without exercising ongoing supervisory or managerial authority.

Terms	Definitions
<b>Full Journey Level (Analyst II)</b>	A level of proficiency within the classification series at which the incumbent is fully trained, experienced, and capable of performing the full range of duties assigned to the classification independently. At the full journey level, incumbents require minimal supervision and are expected to apply sound judgment, technical knowledge, and problem-solving skills to varied assignments. Incumbents may assist in mentoring or guiding less experienced staff, but are not relied upon as the <b>primary</b> subject matter experts for specialized or department-wide issues.
<b>Independent</b>	Independent refers to the ability to perform duties, make decisions, or carry out assignments without direct supervision or detailed instructions, using professional judgment, knowledge, and discretion. The degree of independence expected generally increases with the level of classification. Independent work typically involves minimal oversight or review by higher-level staff or supervisors, initiative in identifying and solving problems, responsibility for planning and prioritizing one's own workload, and authority to make decisions within defined policy or procedural frameworks.
<b>Interdisciplinary</b>	Interdisciplinary refers to tasks or projects that integrate knowledge, methods, or perspectives from two or more areas/fields to address complex issues, develop solutions, solve problems, or achieve a comprehensive understanding. Such work typically involves collaboration across different fields and supports analysis that goes beyond the application of a single discipline. For example, a project that combines air pollution analysis, information technology, and engineering principles may be considered interdisciplinary.
<b>Journey Level</b>	Journey level is the full professional working level in a classification series. Employees at this level are expected to independently and competently perform the full range of duties assigned to the classification, requiring only general supervision. Journey-level employees have acquired the necessary knowledge, skills, and experience to carry out assignments without extensive training and are relied upon to apply judgment and technical proficiency in routine and varied work situations.
<b>Lead</b>	A lead performs work tasks of the same nature and level as the employees they guide, serves as a resource for resolving technical or procedural issues, and regularly coordinates the work of a unit or workgroup. In addition, a lead may carry out limited supervisory-type functions, such as training employees, assigning tasks, answering questions, and reviewing work. A lead does not have responsibility for hiring, disciplining, conducting performance evaluations, or approving leave, and does not exercise direct supervision within the meaning of the Ralph C. Dills Act.

Terms	Definitions
<b>Non-Deep Class</b>	A non-deep class is a classification that does not meet the definition of a deep class under California Code of Regulations title 2, section 425. Non-deep classes typically have a single status range, most often Range A. While a non-deep class may have alternative salary ranges, advancement through those ranges does not confer separate class status. Non-deep classes are not designated by footnote 21 on the pay scale. (See <a href="#">California Code of Regulations title 2, section 425, subdivisions (j) and (k).</a> )
<b>Management</b>	Employees who are responsible for directing and overseeing the work of others, making strategic, operational, and/or policy decisions, and ensuring that organizational goals are met. Management typically includes employees in supervisory, managerial, and executive classifications, who are accountable for outcomes, performance, and results within their areas of responsibility and who may represent the department in high-level meetings or negotiations.
<b>Managerial Designation</b>	A classification status assigned to positions or employees that meet the definition of “managerial employee” under the Ralph C. Dills Act and are therefore excluded from collective bargaining. Positions with managerial designation have significant responsibility for formulating or administering agency or departmental policies and programs, or for administering an agency or department, consistent with <a href="#">CA Government Code section 3513 (e)</a> . Managerial duties generally include but are not limited to strategic planning, high-level decision-making, and oversight of major programs, functions, or organizational units.
<b>May</b>	“May” is a discretionary term. Per <a href="#">California Code of Regulations, title 2, section 13 (c)</a> , “may” means an action that is permitted and acceptable to achieve compliance, but not required. Alternative courses of action are also acceptable.
<b>Multi-Departmental</b>	The scope of impact extends beyond a single department and involves multiple state departments or agencies. This may include policies, programs, or projects that require coordination, collaboration, or alignment across departments and that affect operations or outcomes in multiple organizations.
<b>Professional (Analyst I/II/III/IV) (Supervisor I/II and Manager I/II)</b>	Professional work is predominantly intellectual and varied in character and requires the consistent exercise of discretion and judgment, as defined in <a href="#">California Code of Regulations, title 2, section 254.1</a> , and <a href="#">CA Government Code section 3521.5</a> .

Terms	Definitions
<b>Rank-and-File Designation</b>	A rank-and-file designation is a classification status assigned to positions that are non-supervisory, non-managerial, and non-confidential. Employees in rank-and-file positions perform the day-to-day operational work of state departments and programs within established policies and procedures and do not have authority over personnel actions such as hiring, discipline, or formal performance evaluations. Rank-and-file employees are eligible for collective bargaining under the Ralph C. Dills Act and are typically represented by a union or employee organization.
<b>Regulatory Work</b>	Regulatory work involves interpreting, applying, enforcing, or developing statutes, regulations, rules, or standards established by law or policy. It is performed to ensure compliance with legal or policy requirements and may include oversight, investigation, auditing, monitoring, or enforcement functions.
<b>Shall</b>	“Shall” means must. Per <a href="#">California Code of Regulations, title 2, section 13, subdivision (a)</a> , “shall” indicates an action that is necessary to achieve compliance and for which no alternative course of action is acceptable.
<b>Statewide</b>	Statewide refers to a scope of impact that affects the majority of state departments and/or agencies. Statewide work supports large-scale goals and often involves coordination and collaboration across departments and agencies, and may include providing analytical, policy, or programmatic support that applies broadly across California.
<b>Supervisory Designation</b>	A supervisory designation is a classification status assigned to positions with formal supervisory authority over other employees. Positions with a supervisory designation are responsible for directing and overseeing the work of others, including assigning and reviewing work, training staff, and participating in personnel actions such as hiring, discipline, and performance evaluation. Per <a href="#">CA Government Code section 3513, subdivision (g)</a> , a supervisory employee is an individual who, in the interest of the employer, has the authority to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or the responsibility to direct them, or effectively to recommend such action, where the exercise of that authority is not of a merely routine or clerical nature and requires the use of independent judgment. Employees whose duties are substantially similar to those of their subordinates shall not be considered supervisory employees.

Terms	Definitions
<p><b>Technical (Analyst I/II/III/IV) (Supervisor I/II, and Manager I/II)</b></p>	<p>Technical work involves applying specialized knowledge, skills, and abilities in a specific subject matter area to perform complex procedural or analytical work. Technical work typically follows established statutes, regulations, standards, or guidelines and often leads to clear and definitive outcomes (“black and white”). Technical staff support program and operational functions through tasks such as conducting research, performing analyses, preparing technical reports or documentation, conducting compliance reviews, supporting program implementation or evaluation, and advising management or program staff on technical matters within their area of expertise.</p> <p>For allocation purposes, technical work is distinguished from clerical work by the complexity of assignments and the specialized knowledge, skills, and abilities necessary to perform the job function and from supervisory or managerial work by its focus on application rather than oversight or administrative authority.</p>
<p><b>Under Administrative Direction (Manager II)</b></p>	<p>A level of supervision characterized by broad managerial responsibility for a large program or a set of related functions. Incumbents working under administrative direction are responsible for planning, organizing, and directing major programs or functions and are expected to exercise a high degree of initiative, judgment, and discretion in carrying out the responsibilities aligned with departmental goals and policies. Supervision is typically provided through periodic review of overall results rather than detailed instructions or ongoing oversight.</p>
<p><b>Under Direction (Analyst II)</b></p>	<p>A level of supervision in which the employee performs assigned duties with considerable independence within established policies, procedures, and objectives. The employee receives general instructions regarding the scope and objectives of assignments, while the methods, procedures, and techniques used to complete the work are left to the employee’s discretion. Work is not routinely reviewed except for overall results, policy implications, or long-term impact.</p>
<p><b>Under General Direction (Analyst III/IV, Supervisor I/II, and Manager I)</b></p>	<p>A level of supervision in which the employee is responsible for a program, project, or function and is expected to carry out responsibilities with a high degree of independence and accountability. Guidance is typically provided only for major decisions, policy interpretation, or new and unusual circumstances or complex situations. Work is reviewed primarily for overall results, effectiveness, and alignment with departmental objectives rather than for methods or day-to-day execution.</p>

Terms	Definitions
<b>Under General Supervision</b>	A level of supervision in which the employee has sufficient experience to perform routine duties independently and is expected to use initiative and judgment in carrying out assignments. The supervisor provides guidance and review as needed, typically after work is completed or at key checkpoints, rather than through continuous oversight.
<b>Under Policy Direction</b>	A level of supervision characterized by broad oversight focused on strategic goals and policy implementation rather than operational or procedural supervision. Employees working under policy direction are expected to exercise significant autonomy and make decisions that shape or influence department-wide policies, priorities, and strategic direction. Review is typically limited to overall outcomes and alignment with policy objectives.
<b>Under Supervision (Analyst I)</b>	A level of supervision in which the employee works under close oversight and has ready access to a supervisor for regular guidance, review, and evaluation of work. Assignments are given with explicit instructions or are sufficiently routine that few deviations from established practice occur without supervisory approval. Work is regularly reviewed to support accuracy, consistency, and skill development.