



**COUNTY OF EL DORADO**  
**Classification Study Report**  
*Planning Manager*  
**(Incumbent: Brendan Ferry)**

February 24, 2020

County of El Dorado  
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## Background/Introduction

The Department of Human Resources (HR) received a request to review one position assigned to the Planning and Building Department. This position is encumbered by Brendan Ferry, currently classified as a Planning Manager. Mr. Ferry works in the Planning and Building Department South Lake Tahoe office and receives supervision from Robert Peters, Deputy Director of Planning.

In 2015, the County retained Koff & Associates (K&A) to conduct a County-wide classification study. The purpose of the study was to ensure current class specifications are consistent with industry standards and that employees are in the correct classification based on the duties and responsibilities assigned. K&A provided a final classification report in May 2017.

K&A studied Mr. Ferry's position, and he completed a Position Description Questionnaire (PDQ) as part of the study process. K&A determined his position was performing duties within the current classification, which was Principal Planner. K&A's recommendation was approved to retitle the Principal Planner to Planning Manager.

On February 10, 2020, HR received a request to change Mr. Ferry's classification to Deputy Director of Planning (Deputy Director). The request outlined changes to the position's duties and responsibilities, and HR conducted a new classification study to determine if the position was appropriately classified.

## Study Methodology

In conducting the classification study, HR:

1. Reviewed the Classification Request (dated February 2020).
2. Interviewed the incumbent on February 25, 2020.
3. Analyzed all of the information gathered, class specifications, and interview notes to identify the scope and level of work performed as well as the typical duties and the requisite knowledge, skills, abilities, and other job-related characteristics required to complete the work.
4. Identified an appropriate classification.
5. Developed this Classification Study Report.

## Classification Framework

Classification analysis relies upon sound principles of job evaluation and classification. The approach identifies classifications that reflect distinct differences in levels and types of work as determined through the use of established allocation factors and class specifications. This section of the report presents the conceptual framework for the methods used by HR in analyzing a classification recommendation for the study position.

### General Guidelines and Definitions

#### A point in Time Analysis

A classification study primarily captures the essential nature of positions at a single point in time. Therefore, recommendations are not based upon all possible future changes, particularly in a rapidly changing environment where organizational needs, technologies, and skill requirements are continuously evolving.

#### Whole-Job Analysis

Human Resources uses a whole-job analysis approach. This methodology analyzes the job as a whole, rather than by individual factors, by evaluating the core duties and responsibilities, the nature and level of work performed, and the minimum qualifications which are required to perform the work. The whole-job analysis approach compares jobs with one another based on an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, the magnitude of work, and the accountability for results, is compared as a whole to other positions.

### **Preponderant Duties**

Classification studies often find that positions are assigned a wide range of duties and that incumbents have various levels of responsibility at any one time. Therefore, the positions must be analyzed based on their preponderant duties. Preponderance is a measure of importance; the most preponderant duties of a position are those that support the primary purpose of the position. Sometimes the most time-consuming duties of a position are preponderant; however, consideration must sometimes be given to the responsibility and complexity of certain duties that do not occupy the majority of the incumbent's time. Overall, the determination of preponderance is a judgment call based on a consistent set of factors.

### **Level and Not Volume of Work**

Position classification is a reflection of the level of work performed by an employee; and thus, it is generally independent of volume. For example, if one employee processes double the work of another, yet the percentages of time spent on those tasks and other duties are comparable, a single classification should be appropriate for both positions. Study questionnaires do not ask for, and HR would not consider, the relative productivity of employees when evaluating positions. Likewise, classifications are not distinguished by the amount of time spent by incumbents on tasks or the volume of work assigned to positions since problems of the excessive workload are properly solved by redistributing work or adding employees, and not by creating new classifications.

### **Classify the Position, Not the Person**

Classification recommendations are made based on the position being studied, not the individual occupying the position at the time of the study. In other words, the duties and responsibilities of the job are evaluated rather than the competency or personal characteristics of the employee in the job. That said, the incumbent occupying the position is usually considered to be the "subject matter expert" on the job, and therefore the information provided by the incumbent typically carries substantial weight in the analysis. Exceptions would be if an incumbent has only been in the job a short time and therefore is not fully familiar with the job responsibilities, or if management significantly disagrees with the incumbent regarding the job expectations in which case the management perspective may have a greater influence on the final determination.

### **Determining Classification Breadth and Depth**

Classification plans generally establish classifications based on a determination of "sufficient similarity". However, within an individual organization, sufficient similarity can be interpreted to coincide with the goals and philosophy of the organization. For example, a broad interpretation recognizes positions that share a core set of duties, but accepts substantial variation between positions, resulting in varied assignments within each classification. In contrast, a narrow interpretation might create separate narrow classifications to address such variations.

### **Allocation Factors**

Allocation factors are standards that are used to measure the job requirements of individual positions. The factors can be compared to measure the similarities and differences among positions. The common allocation factors used to evaluate this study position included:

- Decision Making - Consists of [a] the decision-making responsibility and degree of independence or latitude that is inherent in the position, and [b] the impact of the decisions.
- Scope and Complexity - Defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- Contact with Others Required by the Job - Measures [a] the types of contacts, and [b] the purpose of the contacts.
- Supervision Received and Exercised - Describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.
- Knowledge, Skills, and Abilities - Defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

## Classification Analysis

### Current Position Duties

Mr. Ferry has been in his current position as a Planning Manager for approximately six and a half (6.5) years and he performs management work in planning, organizing, overseeing, coordinating, and reviewing the work of a major unit in Planning and Building. Specific duties presented in the following table are taken directly from the Position Description Questionnaire and interview.

ESSENTIAL JOB FUNCTIONS		
Task #	Tasks	Approximate Percentage of Time
1	Manage Staff	10%
2	Independently represent County on major Policy issues at Meetings & Public Hearings (Tahoe Regional Planning Agency Advisory Planning Commission, Kirkwood Tri-County Technical Advisory Committee, Tahoe Alliance, Delta Regional Monitoring Program, Implementers Water Quality Program, Environmental Improvement Program Coordinating Committee, etc.)	20%
3	Manage Meyers Area Plan, Meyers Advisory Council & Tahoe Regional Planning Agency Memorandum Of Understanding	10%
4	Manage Consultant Contracts	10%
5	Perform Administrative Functions like Budget Management and Human Resource Functions	10%
6	Provide Technical Expertise on Water Quality, Current and Long Range Planning or	10%

	Tahoe Related Issues	
7	Take on new Tahoe Initiatives (Housing, Climate Change Adaptation, Vacation Home Rentals, Commercial Cannabis, Model Water Efficient Landscaping Ordinance, etc.)	10%
8	Manage Major Current Planning Projects	5%
9	Manage Storm Water Program	15%

Based on the information above, Mr. Ferry's spends the majority of his time (at least 90%) performing management work related to multiple programs, committees, and projects. Mr. Ferry serves as the primary resource for several major programs in Planning and Building. The duties and percentages of time spent performing them is consistent with the Planning Manager Class. The types of duties described in the Planning Manager class emphasize directing, organizing, overseeing, coordinating, and reviewing the work of a major unit.

## Study Findings and Analysis

In analyzing Mr. Ferry's PDQ it became clear that the scope of responsibilities is above the Planning Manager level. HR contacted Ms. Schmid and Mr. Ferry to obtain additional information and clarification to capture the entirety of the duties to make an accurate recommendation. Mr. Ferry cited that his job duties have changed within the organization over the past several years and that his responsibilities and work complexity have increased. He also stated his job is unique within the County because of his management role in a satellite office in the Lake Tahoe Basin. Being the sole manager in the South Lake Tahoe basin for Planning and Building puts Mr. Ferry in the position of having direct involvement in multiple programs to service the Tahoe area. The changes in his duties and responsibilities as a Planning Manager were discussed in an interview with Mr. Ferry.

The Deputy Director classification has, in addition to the responsibilities outlined at the manager level, increased responsibilities for allocating staff and budget resources among competing demands and performing significant service delivery planning and evaluation at the division level. The main difference between a Deputy Director and a Planning Manager is that the latter has full management responsibility for a recognized division or unit of the organization. The former oversees multiple subunit/s through subordinates. The Deputy Director spends the majority of its time on:

- Policy development and administration
- Long- and short-term planning
- Ensuring compliance with laws, County ordinances, codes, and regulations; and budgeting responsibilities
- Developing, recommending, and setting the programs, projects, goals, and policies and procedures of the division

The PDQ had an emphasis on management and oversight over multiple programs. It is crucial to understand such key distinctions in Mr. Ferry's PDQ. Specifically, the tasks listed below which account for 45% of his time:

- Independently represent County on major Policy issues at Meetings & Public Hearings (Tahoe Regional Planning Agency Advisory Planning Commission, Kirkwood Tri-County Technical Advisory Committee, Tahoe Alliance, Delta Regional Monitoring Program, Implementers Water Quality Program, Environmental Improvement Program Coordinating Committee, etc.)
- Manage Meyers Area Plan, Meyers Advisory Council & Tahoe Regional Planning Agency Memorandum Of Understanding
- Take on new Tahoe Initiatives (Housing, Climate Change Adaptation, Vacation Home Rentals, Commercial Cannabis, Model Water Efficient Landscaping Ordinance, etc.)
- Manage Major Current Planning Projects

These tasks include statements that are consistent with the duties of a Deputy Director, such as:

- Represents the department and delivers presentations at public hearings before the Board of Supervisors; Planning Commissions; the community; county, city, state, and federal agency meetings; and workshops and/or conferences.
- Coordinates regional and statewide policy interpretation; recommends code amendments, solutions to technical problems, and required legal actions; makes final decisions on technical interpretations.
- Oversees highly complex studies and initiatives, very large and potentially controversial projects, or long-term projects with significant economic consequences.
- Develops and directs the implementation of goals, objectives, work standards, and division policies and procedures.
- Monitors changes and interprets laws, proposed legislation, regulatory requirements, ordinances, and technology that may affect planning issues; evaluates their impact on County operations and implements policy and procedure improvements; and ensures adherence to applicable laws, codes, regulations, and guidelines.

While a Planning Manager can perform these tasks to a lesser degree, it would not be for multiple units or divisions as described but for a single unit or division. The performed tasks are for units including Current Planning, Building, Long Range Planning, Storm Water Unit, and Vacation Home Rentals program. The task of "Independently represent County on major Policy issues at Meetings & Public Hearings..." is consistent with the Deputy Director class because it is performed for most all of Planning and Building's various divisions for the Tahoe region. A Planning Manager can represent the County at a Board or Commission meeting; however, the task includes independently representing the County on major polices issues for multiple programs or units. Due to the level of responsibility and independence, it is appropriate for a Deputy Director to perform this task.

Mr. Ferry provided the following examples of his duties that align with a Deputy Director class:

- Storm Water Program – This was the single program Mr. Ferry was hired to manage. Several Storm Water Coordinators report to Mr. Ferry and an Associate Planner who works in the program. Over time Mr. Ferry has become responsible for other programs, including the South

Lake Tahoe Cannabis Program, Vacation Home Rentals, Meyers Area Plan, various MOU's and Committees. Due to his work location in South Lake Tahoe, he operates with little supervision or direction which requires a high level of technical expertise and discretion. Additionally, a key ability of a Deputy Director is to conduct effective negotiations and effectively represent the County and the department in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory, and legislative organizations.

- Budget Control – Mr. Ferry develops and monitors his program budgets. He plans and authorizes staff training, equipment expenditures, and authorizes contract expenditures and adjusts his programs budgets. In an attempt to offset expenses and reduce costs, he pursues grants by identifying problems that need funding and writing the grant proposal. Planning Managers typically assist in the budget process for a single unit or division but Mr. Ferry supports multiple units and divisions in their budget process. Mr. Ferry currently controls approximately 1 million dollars of the County's Planning budget.
- Consultant and Lobbyist management – Mr. Ferry is responsible for managing multiple consultant contracts involving budgeting, expenditures, and costs. Mr. Ferry has the unique task of handling a County Lobbyist consultant contract. He determines with input from the Director of Planning and Building what the County's interests are and drafts letters of support and meets with the consultant to further those interests.

### Supervisor/Manager Comments

Ms. Schmid, Director of Planning and Building, provided input on the PDQ and subsequent clarification to Human Resources by email, affirming the duties and responsibilities communicated by Mr. Ferry. She agreed that because of the unique management role in a satellite office, the responsibilities, and limited supervision, his role is closer to a Deputy Director, rather than a Planning Manager. She commented that over the past few years, Mr. Ferry managed the Tahoe Planning Office operations and staff; and consistently represented the County at an executive level, no different than a Deputy Director.

While Ms. Schmid recognizes that Mr. Ferry does not currently have subordinate managers, if his position is classified as a Deputy Director, there will be organizational structure changes that would move some responsibility from the current Deputy Director to this position. With the purposed organizational restructure one or more Planning Managers and Supervisors will report directly to this position to align with a more traditional Deputy Director. Not included in this report are the potential organization changes because they are not finalized at the time of this report.

### Comparator Classes

Human Resources conducted a comparative analysis of the incumbent's current class, Planning Manager and the requested class of Deputy Director.

#### **Class Specification Content – Planning Manager**

Planning Managers under general direction, plans, organizes, oversees, coordinates, and reviews the work of a major unit, including long- and short-term project planning, program planning, and compliance, and other programs; serves as project manager for complex development applications and special projects; performs professional office and fieldwork involved in planning, zoning, and land use matters; coordinates assigned activities with other County departments and outside agencies; provides highly complex and responsible staff support to department and County management in areas of



expertise; and performs related duties as assigned.

The "Examples of Typical Duties" section within the class specification further articulates the associated duties and responsibilities assigned to the classification.

### **Class Specification Content – Deputy Director of Planning**

Deputy Director under administrative direction, plans, organizes, and provides general direction and oversight for all functions and activities of the Current Planning and Long Range Planning Division within the Planning and Building Department; provides expert professional assistance to the department head and management staff on current and advanced planning functions, land use policy, and general plan implementation-related matters; manages professional and technical staff and subordinate supervisors, and performs related duties as assigned.

Additionally, the Deputy Director:

- Is responsible for implementing policy, developing goals and objectives, administering the division's budget, and supervising management, professional, technical, and administrative staff; using considerable independence, initiative, and discretion within established guidelines.
- Develops and administers the annual budget and project budgets for the Current Planning and Long Range Planning Division; directs the forecast of additional funds needed for staffing, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary.
- Continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of changes.
- Acts on behalf of the Planning and Building Director in his/her absence.

Both the Planning Manager and Deputy Director classifications have similarities in that they manage programs. As such, in many cases, Mr. Ferry is performing duties consistent with both class specifications. The determination of classification came down to the allocation factors of decision making, scope and complexity, and contact with others required by the job. This analysis supports Mr. Ferry spending approximately 45% of his time performing executive management duties. The majority of his time is not expended on these duties; the preponderant duties include significant service planning and delivery for several units and divisions within Planning and Building. The independent decision making involving multiple programs (Building Division, Code Enforcement, Cannabis Program, and Vacation Home Rentals) in addition to the Storm Water Program oversight means these responsibilities cross over to various units and divisions. In managing all the South Lake Tahoe basin programs, Mr. Ferry's scope and complexity of duties are above the level of a Planning Manager, and he is responsible for representing the County to multiple governing boards, committees, and agencies often by himself. In performing his duties, he has a lower level of supervision than most Planning Managers, and the impact of the decisions he routinely makes aligns with a Deputy Director class.

To distinguish the duties performed, HR reviewed specific tasks in comparison to each classification and identified several that are not represented in the Planning Manager specification, as follows:

- Acting as Department Representative – Serving as a subject matter expert and representing the County at a variety of community meetings. Examples include various Board meetings, Committee meetings, and Advisory panels directly providing leadership, staff resources, and technical expertise. While a manager may have responsibility for a single unit, Mr. Ferry has responsibility for multiple units and programs at both sites such as the Storm Water Program.
- Budget development – In conjunction with department and CAO fiscal staff, the study position develops the annual budget and project budgets for multiple divisions.
- Planning and Building in Tahoe Basin – Management responsibilities for all Planning and Building programs and projects in the Tahoe area. In addition to Tahoe's specific duties, Mr. Ferry is assigned the Storm Water program for Placerville.

## Recommendation

Based on the PDQ, interviews, and analysis of duties performed by the position, specifically those having an increase in responsibility and those at an executive level, Human Resources finds that Mr. Ferry's position is performing work at a Deputy Director level. **HR recommends classifying the study position to Deputy Director of Planning and that Mr. Ferry is reclassified to a Deputy Director of Planning.**