

METROPOLITAN EXPOSITION-RECREATION COMMISSION

RESOLUTION NO. 07-22

Approving Implementation of the MBL Group Compensation Study for Non-Represented Employees

WHEREAS, Section 5.6 of the Commission's Personnel Policies requires the Commission to conduct a Classification and Compensation Study for each non-represented full-time job every five years; and

WHEREAS, the last compensation study was conducted in 2002 and its recommendations implemented by the Commission in July 2002; and

WHEREAS, Section 6.3 of the Commission's Personnel Policies requires the pay ranges for positions included in the merit-related compensation program to reflect the market pay level for similar jobs; and

WHEREAS, the integrity of the merit-related compensation program depends on the pay ranges being accurately established in accordance with the labor market; and

WHEREAS, to recruit and retain adequate numbers of competent part-time employees, the Commission should establish a consistent part-time pay schedule; and

WHEREAS, the Commission retained the MBL Group, LLC, selected through a request for proposal process, to evaluate Commission titles, pay ranges, performance evaluation tools and merit pay delivery methods; and

WHEREAS, the MBL Group, LLC recommends that the Commission adopt a revised classification system and adjust pay ranges to accurately reflect the work Commission employees are actually performing and enables the Commission to more efficiently and effectively utilize the knowledge, skills and abilities of its employees; and

WHEREAS, the MBL Group, LLC recommends that the Commission adopt a revised approach to performance evaluations and to its delivery of merit-related compensation; and


WHEREAS, the Commission has a responsibility to both compensate its staff fairly and manage its budget and expenditures in a manner consistent with the public interest;

BE IT THEREFORE RESOLVED that:


1. The Commission's classification system, pay ranges, and implementation plans as contained in Exhibit A are adopted; and
2. The General Manager is directed and delegated authority to implement the new and modified classifications and pay ranges contained in Exhibit A, retroactive to July 1, 2007; and
3. The General Manager is directed and delegated authority to implement the performance evaluation and merit-pay delivery tools contained in Exhibit A beginning in the Fiscal Year 2007-08 evaluation cycle; and

4. The General Manager is directed and delegated authority to manage the transition process between the old and new performance evaluation and merit pay systems.

ADOPTED by the Metropolitan Exposition-Recreation Commission this 25th day of July, 2007.



Chair



Secretary/Treasurer

Approved as to Form:
Daniel B. Cooper, General Counsel

By: 

Nathan A. Schwartz Sykes
Senior Attorney

MERC STAFF REPORT

Agenda Item/Issue: CONSIDERATION of Resolution Approving Implementation of the MBL Group Compensation Study for Non-Represented Employees

Resolution No.: 07-22

Date: July 25, 2007

Presented by: Rachel Bertoni and Dianne Burt-Green, Principal, MBL Group

BACKGROUND:

In autumn 2006, MERC, under the guidance of the MBL Group, LLC, began the process to improve MERC's merit-based pay delivery system, in a manner that helped align MERC staff with the Mission/Vision/Values and Strategic Goals of the organization. A number of internal stakeholders were involved in the project, most notably the MERC Senior Leadership Team, the Merit & Incentive Task Force, a variety of managers and supervisors throughout the agency, and the non-represented staff. This report represents the bulk of the project work, particularly the classification, compensation and performance evaluation/merit-pay delivery recommendations.

The classification aspects of the project included the creation of more generic classification descriptions combining comparable duties across the venues, and a shift in the classification descriptions from "task lists" to higher level descriptions of areas of responsibility. Finally, the classification descriptions now communicate MERC's Mission, Vision and Values. Employees and managers were involved in the development and review of the new classification descriptions.

The compensation portion of the project consisted of a market assessment comparing MERC classifications to relevant market data and the creation of new salary structures for full-time and part-time, non-represented staff, based on the market assessment.

Finally, the performance evaluation portion of the process resulted in the development of a performance evaluation system that is tied to whole job content, rather than only portions of the job. MBL Group has recommended that MERC adopt a merit pay model that links employee "whole job" performance to pay and that allows the agency reliable budgetary control of the program. This tool is called a "merit matrix" and it addresses base pay management.

During the project, the Senior Leadership Team was consulted at key junctures so that the venues' business needs could be integrated into the recommendations. Where needed, the Metro Attorney's Office reviewed the material for regulatory compliance.

In the autumn of 2007, the final portion of the project, the development of an incentive plan, will be presented to the Commission.

<u>FISCAL IMPACT:</u>	\$13,242	to adjust full-time salaries to range minimums
	\$94,524	to adjust part-time wages to range minimums
	\$107,766	Total estimated implementation costs

Existing appropriations within the MERC-wide FY 2007-08 budget are projected to fund these costs, although adjustments between departments may be necessary.

RECOMMENDATION: Staff recommends Commission approval of Resolution 07-22.



Classification & Compensation and Performance Evaluation Study

Executive Summary *(Part 1)*

Prepared by MBL Group, LLC.
Portland, Oregon
July 2007



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Classification, Compensation and Performance Evaluation Study

~ Executive Summary ~

Executive Summary

MERC engaged MBL Group, LLC to conduct a comprehensive Classification, Compensation and Performance Evaluation Study for the Agency. This assessment encompassed the 83 non-represented full-time and 65 part-time MERC non-represented positions currently covered by 79 classification job descriptions. Temporary positions, those that are no longer utilized at MERC, and hourly represented positions covered by a collective bargaining agreement, were not evaluated as part of this study.

The purpose of this assessment was to fulfill MERC's goal of conducting a review of their current compensation and performance evaluation system to understand their competitive position relative to market and to improve its approach to merit driven compensation.

It should also be noted that this Executive Summary covers the Classification, Compensation and Performance Evaluation elements of the Study. The feasibility of implementing incentive pay for non-represented staff members is still being evaluated. It is MERC's goal to have a recommendation before the Commission in early Autumn.

The following Executive Summary will outline in greater detail the methodology, findings and recommendations of this 2007 Classification, Compensation and Performance Evaluation Study.

Upon the completion of this assessment of MERC's classification, compensation and performance evaluation study, MBL recommended the following:

- Formalized statement of compensation philosophy / strategy linked to MERC's newly stated Mission / Vision / Values.
- Creation of generic classification descriptions combining redundant / comparable duties, cross-venue job titles, and scope criteria for comparable levels throughout the organization.
- Market assessment comparing MERC classifications to relevant market data.
- Creation of new Pay Grades & Ranges for full-time and part-time, non-represented staff, based on the above referenced market assessment.
- Performance evaluation system tied to whole job content.
- Merit pay model that links an employee's "whole job" performance to pay.

At the outset of this project, the Merit & Incentive Task Force (the group formerly known as the "PFP Committee") was created to offer input and suggestions into process flow and design elements. This group was comprised of representatives from all MERC venues and represented a breadth of MERC departments. MBL and MERC wish to thank the Merit and Incentive Task Force for their input and participation in this process.

The Merit & Incentive Task Force members included:

- Bruce Burnett, Guest Services Manager, OCC
- Jim Benson, Operations Coordinator, PCPA
- Lisa Brown, Executive Assistant, OCC
- Lori Leyba Kramer, Assistant Executive Director, PCPA
- Lynn Hunter, Maintenance Supervisor, OCC
- Mark Williams, Director of Events, OCC
- Randy Downs, Operations Manager, Expo Center
- Shiu Ram, Accountant, MERC Admin
- Project Manager: Rachel Bertoni, MERC Human Resources Manager

In addition, the MERC Senior Leadership Team acted as a consultative and leadership body at various points during this study, outlining compensation philosophy, reviewing compensation data and the "proposed" performance evaluation tool, and providing input on merit-pay delivery models.

Background Information

MERC, a subsidiary of Metro regional government, is accountable for management of major public assembly facilities in the Portland, Oregon region. These facilities include the Oregon Convention Center, the Portland Center for the Performing Arts and the Portland Metropolitan Exposition Center.

MERC is governed by a seven-member Commission, members of which are appointed by the Metro President and approved by the Metro Council. The MERC CEO is accountable to the Commission for leadership and management of the organization, including supervision of a Facility Director in each of the three facilities and the Deputy General Manager. The organization operates with periodically updated strategic and operating plans, which provide direction and drive performance-based management.

- ❖ **Oregon Convention Center:** At nearly one million square feet the OCC is the Pacific Northwest's largest trade show and multi-purpose facility. It hosts conventions, trade shows and community events. Opened in September 1990, OCC has generated more than \$5.4 billion in total economic benefits for the Tri-county metropolitan region, including more than \$163 million in tax revenue that helps to pay for public services. Since 1990, more than 5,000,000 people have attended OCC events. OCC employs 106 full-time staff, as well as a very large pool of event-specific staff. The annual revenue budget approximates \$16 million, about 75% of which is operating revenue.
- ❖ **Portland Exposition Center (Expo Center):** The Expo Center is the largest consumer and trade show venue of its kind. The 60-acre site includes four interconnected buildings with total exhibit space exceeding 330,000 square feet and parking for more than 2,500 vehicles. Expo hosts various expositions including antiques, autos, boats, collectibles, home and garden, dances and festivals. Annual operating revenues approximate \$6 million, and the full-time staff numbers 15, with a large pool of event-specific staff.
- ❖ **Portland Center for the Performing Arts:** PCPA is a four-theatre complex comprised of the Keller Auditorium, the Arlene Schnitzer Concert Hall, the Newmark Theatre, and the Dolores Winningstad Theatre. These four venues host more than 1,000 performances annually, with attendance in excess of one million people. PCPA is home to eight acclaimed, resident companies. They include the Oregon Ballet Theatre, the Oregon Symphony Orchestra, the Portland Opera, the Oregon Children's Theatre, the Tygres Heart Shakespeare Company, the Portland youth Philharmonic and Tears of Joy. PCPA employs about 45 full-time staff, as well as a very large pool of event-specific staff. The annual revenue budget approximates \$6 million, about 80% of which is operating revenue.
- ❖ **MERC Administration:** MERC Administration employs approximately 20 staff and provides administrative, information technology, human resources and marketing/communications support to the entire agency

The scope of the Classification, Compensation and Performance Evaluation Study consisted of three fundamental elements:

- Element 1 – Classification and Compensation Review
- Element 2 – Performance Evaluation and Performance-Based Pay
- Element 3 – Incentive Pay

Classification and Compensation Review

MERC last conducted a classification review of its non-represented positions in 2001. At the start of the 2006/2007 study, MERC's classification system was specialized; that is, with very few "generic" classification descriptions usable by more than one functional area. One goal of this element of the study was to develop a classification structure that was flexible and responsive to changing business needs, and which correctly reflected the essential functions and bona fide occupational qualifications of each job.

MERC recruits its staff from a wide variety of competitors — some specialized jobs are recruited nationally from comparable venues within MERC's specialized industries, while other jobs are recruited locally from other public or private sector employers. A second goal of this element of the study was to verify MERC's position relative to market for its non-represented positions and to update and clarify its salary schedules.

Performance Evaluation and Performance-Based Pay

MERC currently conducts annual performance reviews of all full-time non-represented staff, under its Pay-For-Performance (PFP) Program. While mid-year evaluations are conducted, formal performance reviews are conducted on a focal date basis, with performance goals established on a fiscal year basis. Most of the staff receive individual performance goals based on their individual jobs, but some staff (primarily hourly, non-project oriented staff) are evaluated under a pre-established set of performance expectations.

Part-time, non-represented staff, who work widely varying numbers of hours in any one year, receive evaluations as their managers consider appropriate, not at a pre-established time. In addition, these part-time employees do not currently receive merit pay or pay for performance increases. After one year of service, all members of the same classification receive the same "flat rate", regardless of individual performance levels.

One goal of this element of the study was to update MERC's evaluation process and tool to allow for better communication between managers and staff, a greater emphasis on the connection between individual and organizational performance, and a less-cumbersome administration process. MERC identified that the current performance evaluation system emphasizes results, without a lot of emphasis of the method by which results are met. MERC's goal was to develop an evaluation methodology that included behaviors and methods, as well as results.

Further, MERC was interested in improving its method of merit/performance-based pay to reflect best practices, fiscal sustainability, and motivate strong performance through base pay increases, lump sum bonuses or some combination of the two. MERC wanted to explore the possibility of providing performance-related or incentive pay to its part-time staff.

Incentive Pay

The assessment of implementing an MERC-wide incentive pay plan is still under review. It is MERC's goal to have a recommendation before the Commission in early Autumn.

Project Objectives

MBL identified nine objectives at the outset of this project:

Classification and Compensation Review

1. Clarify and document the compensation philosophy, goals, purpose, objectives and strategy.
2. Review and evaluate the current job classification system, assess the accuracy of education and experience requirements, and recommend modifications as needed.
3. Review the format and, as necessary, revise the classification descriptions.
4. Conduct a compensation base pay market assessment which will include:
 - Conducting an assessment of base pay in comparison to appropriate industry, region and work-type salary survey data.
 - Updating the organization's pay structures for non-represented staff and management in 79 positions.
 - Analyzing each position to determine proper FLSA status.
 - Make recommendations for changes to the salary schedule.
 - Support the Classification Committee on appeals.
5. Develop manager and employee communications and training to support MERC in a communications strategy for implementation.

Performance Evaluation and Performance Based Pay

1. Understand and evaluate MERC's performance management / pay-for-performance philosophy and objectives.
2. Understand the history and past practices to identify strengths and areas for improvement.
3. Review and evaluate the current performance evaluation and pay-for-performance program.
4. Recommend improvements in the method of delivering performance based pay based on best practices, fiscal sustainability and motivation of employees.

Classification, Compensation and Performance Evaluation Study Methodology

MBL received a combination of documents that allowed full comprehension MERC's classification, compensation and performance evaluation systems, including the following:

- MERC Mission / Vision / Values Statement
- Organization charts
- Employee rosters
- Classification descriptions
- Pay grade structures including MERC's "Front of House" custom survey and internal documents outlining union pay scales and compression comparators
- Pay for Performance – Goals / Objectives / Expected Results

Compensation Philosophy / Strategy Statement

In late October 2006, members of the Senior Leadership Team and the Merit & Incentive Task Force met to explore the pros and cons of the current compensation and performance management systems. From these sessions, there was general agreement about what works well and what could be improved upon:

PROS

Common to Both Groups	
<ul style="list-style-type: none"> • Self Evaluation 	
Senior Leadership Team	Merit & Incentive Task Force
<ul style="list-style-type: none"> • Staff is motivated to achieve goals • Goals communicate there is an expectation for greater contribution • Employees take pride in organization success • Last year there was greater emphasis on facility success vs. individual success • Organization goals boost morale (OCC) 	<ul style="list-style-type: none"> • Having a performance management system • Performance is tied to building goals • Quarterly reviews (in some areas) are being conducted • No surprises • Employees have input into developing own goals • System rewards employees for more than just showing up

CONS

Common to Both Groups

- No flexibility
- Cumbersome process
- Unrealistic / unachievable goals
- Schedule of the system – write goals at the busiest time of year and not given enough time
- External factors that affect goals are not taken into consideration. Unforeseen events trump established goals

Senior Leadership Team	Merit & Incentive Task Force
<ul style="list-style-type: none"> • If it is not in the goals it is not recognized • Only compensated for achieving goals • No way to factor in extraordinary achievement or work outside of goals • "How" I achieve the job is only a small component • Quality of work is not linked to the goal • Scale of goals – same job; different value on magnitude, disparity in magnitude • Level of difficulty/complexity of goal is not taken into consideration • No reward for day-to-day duties • Behavioral factors are not measured • No training on how to use the system created inconsistencies in measuring and developing goals • Complete next year's goals before current year's evaluation • Strictly about measuring results which creates an artificial rating • No system for reviewing part-time employees • New employees are evaluated on same scale as long term employees • Rating calibration – administrative support jobs difficult to measure 	<ul style="list-style-type: none"> • Quarterly reviews inconsistent • Self evaluation may be redundant • Inconsistent scoring by managers • Goals are too quantity based • Goals are dependant on help from others to achieve • Ineffective form (prefer one-on-one) • Goals not developed mutually – counter productive goals amongst departments • Conflicting goals - individual goals are not aligned with overall organization success/goals • Seems to be an aversion to building stretch goals – promotes underachievement • Receive poor review if you do not reach your stretch goals • Too labor intensive • Inequity in scoring • Is perceived as a tool to control the budget • Does not recognize difference between good and bad performance • Measurable goals do not fit into organization/industry • Some jobs do not have "measurable" tasks, more process orientated. Goals were "made up" to fit into the process • System has lost its integrity • Timeliness of accomplishing goals is irrelevant to the work • We were sold on the system on the potential of high earnings then goals were set deliberately too high

The output from these meetings provided MBL with the framework and roadmap for the remainder of the project. A full summary of the October 27, 2006 meeting is attached in Appendix #1.

In January, 2007, MBL facilitated a joint meeting between the Senior Leadership Team and the Merit & Incentive Task Force to introduce the concept of "Merit-Driven" compensation and guide a discussion about differing methodologies. This discussion was intended as an educational process step to ensure that the venues' business needs could be integrated into plan design elements. The PowerPoint presentation of the January 26th meeting is attached in Appendix #2.

Classification Descriptions

MERC began the classification / compensation portion of this study by embarking on a process to update its existing classification descriptions. To do this, MBL developed a Position Description Questionnaire (PDQ). Two different PDQ's were created: one for full-time staff, and the other for part-time or event driven staff. A sample of both PDQ's is attached in Appendices #3 and #4.

The purpose of the PDQ was to capture information necessary to develop a clear and concise understanding of the roles within MERC. As a secondary benefit the information provided in the PDQ will also assist in other human resources functions, such as recruiting, employee development, developing and administering performance management programs, and/or ensuring the compensation system is competitive and fair.

Non-represented staff members were asked to partner with their supervisors or managers to complete a PDQ for their position. Individuals were asked to give clear, factual, and specific descriptions of their job duties so that a person unfamiliar with the job would be able to understand its contents. Where multiple incumbents filled a similar job classification in a single work group, one consolidated PDQ was prepared. Senior Managers and employees had the opportunity to review their classification descriptions and request reviews or changes to make the description fully accurate.

Based on the information provided in the PDQ, MBL revised MERC's 79 Classification Descriptions. As highlighted in the initial background information, MERC desired that the new classifications be consistent in format and allow for maximum flexibility and responsiveness to changing business needs, while correctly reflecting the essential functions and bona fide occupational qualifications of each job. To accomplish this objective MBL created generic classification descriptions by combining redundant / comparable duties, creating generic / cross-venue job titles, and creating scope criteria for comparable levels throughout the organization. Exemption status under the Fair Labor Standards Act (FLSA) was reviewed and approved by Metro Counsel, Nathan Sykes. Twenty-five (25) obsolete / temporary positions were deleted as a result of this consolidation process. A Classification Description template and a complete listing of MERC job titles, new to old, is attached in Appendices #5 and #6. A complete set of updated Classification Descriptions are located in the MERC Human Resources office.

Market Assessment

For the compensation portion of this assessment, MBL's objective was to compare MERC's positions to relevant market data. In that MERC recruits nationally for some specialized jobs and locally for other positions, market data was gathered from a variety of credible sources and included both public and private sector employers. Where published survey resources were not available for specialized, industry specific positions, MBL conducted a custom survey.

MBL compared MERC's positions to the following 17 salary surveys:

<u>Survey Source</u>	<u>Survey Name</u>
• Cascade Employers Association	2006 Regional Pay Survey – Exempt
• Cascade Employers Association	2006 Regional Pay Survey – Non-Exempt
• Dolan Technologies Corp.	2005 Executive Compensation Data
• Dolan Technologies Corp.	2006 Pacific Northwest Compensation Data
• Employers Association Group	2005 National Engineering & IT
• Employers Association Group	2006 Executive Compensation
• Milliman, Inc.	2006 Northwest Information Technology
• Milliman, Inc.	2006 Northwest Management & Professional
• Milliman, Inc.	2006 NW Executive Compensation
• Milliman, Inc.	2006 Portland Area Cross-Industry
• Milliman, Inc.	2006 Oregon Public Employers
• Watson Wyatt	2005 Professional Personnel
• Watson Wyatt	2006 Technical & Skilled Trades
• MBL Group, LLC	2006 Convention Center - Custom Survey ¹
• MBL Group, LLC	2006 Expo Center/Fairground - Custom Survey ²
• MBL Group, LLC	2006 Theater & Performing Arts Center – Custom Survey ³
• MERC Human Resources	2006 Front of House – Custom Survey
•	

The surveys used in this compensation assessment report pay for various geographic markets. Many times these surveys will also provide data by industry, organizational size and area of emphasis, which allowed MBL to capture data in areas of similar comparison to MERC as follows:

- All Industry
- Like-Industry (Public Sector)
- Annual Operating Budget (MERC - \$40M)
- Geography (National, PNW, Portland)

¹ MBL Group Convention Center Custom Survey final report has been provided to MERC Administration and is located in the Human Resources Office.

² MBL Group Expo Center / Fairground Custom Survey final report has been provided to MERC Administration and is located in the Human Resources Office.

³ MBL Group Theater & Performing Arts Center Custom Survey final report has been provided to MERC Administration and is located in the Human Resources Office.

Each of these surveys has a different format and composition. For example:

- Job Descriptions: Each survey has a different scope in terms of the jobs it covers. Some surveys are generic in nature, while others are industry or profession specific. For example, the Milliman Portland Area Cross-Industry is a benchmark survey that covers a variety of common jobs found in a variety of industries. On the other hand, the MBL Convention Center Survey is specific to positions commonly found in these venues. The Milliman Executive Survey, reports data for CEO and CFO; the Cascade surveys do not.
- Pay Data: All salary surveys typically report base pay – the average base wage paid to incumbents in the jobs surveyed. Some surveys also report incentive pay and some surveys report salary structure information.
 - Base pay data is typically reported in terms of simple and weighted averages. These two data points are the most abundant sources of data in any salary survey.
 - In addition, many surveys will report percentiles: 50th percentile (median), 25th percentile or 75th percentile. Percentile data, however, is less frequent in salary surveys.
 - Some surveys also report incentive and total cash while others do not.
- Participants: The mix of organizations that participate in the different salary surveys varies significantly. Each survey reports data from various companies and blends it together to produce the overall survey results. As an example, MERC participates in the Milliman Portland Area Cross-Industry Survey, but they do not participate in either of the Dolan Technologies surveys.

ALL participant data in any published salary survey is confidential. It is NOT possible to read a survey and pick out a specific organization's data.

In addition to the published and custom surveys listed above, MERC provided MBL with additional data to understand internal equity / compression comparators and applicable represented employee pay scales.

Based on these sources, MBL was able to compare the majority of MERC's 79 positions to salary survey data. Base pay, incentive pay practices and total compensation data was gathered for each position. All market data was aged to July 1, 2007. MBL was able to identify applicable published market data for all but seven (7) of the 79 positions. For those seven positions, internal comparators were used for placement into the new pay schedules.

At the conclusion of the market assessment, MBL created three (3) new sets of Pay Grades & Ranges to replace MERC's four (4) existing Pay Schedules. The "market weighted average"⁴ from the salary surveys became the anchor for the new pay range midpoint and a structure was created that confirmed MERC's position relative to market for its non-represented positions.

⁴ "Market Weighted Average" is the average wage, computed by totaling the wage paid to each incumbent and dividing by the total number of incumbents. This measure reflects the influence on the marketplace by organizations with many incumbents in one position.

New Pay Grades & Ranges were created for:

- Full-time Staff
 - Exempt
 - Non-Exempt
- Part-time Staff

Full-time Pay Grades & Ranges were created in a linear fashion and divided into quartiles:

- Minimum rate
- 2nd quartile
- Midpoint rate
- 3rd quartile
- Maximum rate

Full-time Pay Ranges vary in width from 30% for entry level positions to 50% for senior leadership positions. Pay Grades escalate from 10% to 16% between the midpoints. Progression through a Pay Range is based on an individual's performance as summarized in the Annual Performance Evaluation and a new tool called a "Merit Matrix" (explanation begins on page 15).

Part-time Pay Grades & Ranges were created on a three-rate basis:

- Hire / Entry rate
- 1st year rate
- 2nd year rate

Part-time Pay Ranges escalate 2.9% from Hire/Entry rate to 1st year rate; 2.8% from 1st year rate to 2nd year rate. Progression through the Pay Range assumes an individual's acceptable performance. Currently, MERC progresses Part-time staff through the pay range in 1 year. The new Part-time Pay Grade & Range structure creates a 2-year progression.

In comparing MERC's old Pay Schedules to the new Pay Grades & Ranges, 74 positions' new "pay range maximum" is greater than the old "market target". Of the 79 total positions, 66 positions' new "pay range midpoint" is equal to or greater than the old "calculated" midpoint. This analysis confirms that MERC's new Pay Grades & Ranges met the objective of market equity and internal realignment. A full summary of the new Pay Grades & Ranges for full-time and part-time staff is attached in Appendix #7.

To understand the financial impact of the market assessment to the organization, MBL prepared a Budget Impact Analysis for both full-time and part-time staff. This analysis highlights the overall annualized costs to MERC to implement the market assessment and the new Pay Grades & Ranges.

The result of the Full-time Budget Impact Analysis is as follows:

Staff	Individuals Affected	Cost to bring to range minimum	Percent (%) of Full-time Payroll
Non-Exempt Staff	1	\$1,207	0.14%
Exempt Staff	6	\$12,035	0.29%
Total	4	\$13,242	0.26%

The result of the Part-time⁵ Budget Impact Analysis is as follows:

Staff	Individuals Affected	Cost to bring to range minimum	Percent (%) of Part-time Payroll
Total	63	\$94,524⁶	0.08%

A complete Budget Impact Analysis for full-time and part-time staff is attached in Appendix #8.

⁵ Part-time Budget Impact Analysis is based on "average" hours worked by part-time staff in 2006. Actual implementation costs may be lower or higher based on current headcount.

⁶ The majority of the Part-time implementation assessment applies to Job Code #8150 – AV Production Person. Implementation costs to bring this group to the new pay grade minimum totals \$65,709.

Performance Evaluation and Performance-Based Pay

Performance Evaluation

The second critical project objective of the Classification, Compensation and Performance Evaluation Study was to evaluate the effectiveness of MERC's evaluation process and tool. As outlined in the introduction background information, the current PFP system incorporated design elements that were no longer functionally acceptable to the organization. In conjunction with the Merit & Incentive Task Force and MBL, MERC evaluated several different approaches to enhance the performance appraisal / evaluation process.

MERC identified the opportunity to improve its communication of expectations to employees through a fair and consistent organization-wide performance evaluation process that takes a "holistic" approach to each individual's performance vs. only individual-specific goals and objectives. In addition, MERC identified the opportunity to augment that communication process by linking pay more effectively to performance.

Performance evaluation, when done consistently and in a manner that involves those affected and focuses on clearly definable and measurable criteria, has proven to be successful and highly beneficial for organizations of all types and sizes. MERC's new Annual Performance Evaluation tool identifies:

- How the position specifically supports MERC Strategic Business Goals
- Key job responsibilities
- Core competencies / behavioral attributes that support MERC's Mission / Vision / Values statement

The new "Annual Performance Evaluation" tool is included in Appendix #9.

Merit Matrix

MBL recommends that MERC adopt a merit pay model that is based on a “merit matrix.” A merit matrix is a tool used to recognize both an employee’s individual performance and their base compensation relative to the market rate for their position. Following is a sample merit matrix:

Sustained Performance Level/Salary Position	Exceptional	Distinctive	Successful	Needs Improvement	Un-satisfactory
Q1	%	%	%	%	0
Q2	%	%	%	0	0
Q3	%	%	%	0	0
Q4	%	0	0	0	%

The shaded areas in the above model represent that *target relationship* or *target alignment* between pay level and sustained employee performance. A very strong performer, who receives a rating of “Exceptional” or “Distinctive” for a period of several years, should be progressing toward the fourth quartile more aggressively during that time.

Typically, organizations determine the amount they can afford to spend in a given fiscal year (the merit budget) and then, based on the distribution of employee ratings by supervisors and managers, plot the numerical values of the cells. This permits organizations to optimize each merit dollar spent, by aligning the pay increase opportunities with the precise distribution of employees in each cell of the matrix. Most commonly, organizations that use a merit matrix to delivery salary dollars do so *in lieu of* COLAs or other general increases.

The merit matrix approach is an extremely common method in the private sector and among public sector organizations with the flexibility to adopt variable pay programs of one type or another. It reflects compensation best practices from the perspective of differentiating between different levels of performance and in setting compensation levels effectively. As an aside, Metro has adopted a merit matrix approach as an element of its compensation system.

Please note, however, that rating inflation or deflation can significantly impact the organization’s ability to use a merit matrix with optimum efficiency. If all employees receive the top rating, the organization cannot provide significant pay increases without exceeding its merit budget.

Merit pay will only succeed if it is based on the concept that merit pay is awarded for performance against “whole job” expectations and work that exceeds basic job requirements.

Overall Findings & Recommendations

The preceding Classification, Compensation and Performance Evaluation assessment provided MERC with the information necessary to determine an appropriate course of action based on business objectives, market conditions and the organization's financial ability to reward.

MBL's overall findings and recommendations include the following:

Classification

- Creation of generic classification descriptions combining redundant / comparable duties, cross-venue job titles, and scope criteria for comparable levels throughout the organization.
- Shift the classification descriptions from "task lists" to higher level descriptions of "areas of responsibility".
- Use of the classification descriptions to communicate MERC's Mission, Vision and Values.

Compensation

- Market assessment comparing MERC classifications to relevant market data.
- Creation of new Pay Grades & Ranges for full-time and part-time, non-represented staff, based on the above referenced market assessment.
- As referenced in the "Executive Summary" section of this report, MERC is interested in improving its method of merit/performance-based pay to reflect best practices, fiscal sustainability, and motivate strong performance through base pay increases, lump sum bonuses or some combination of the two. MERC is exploring the possibility of providing performance-related or incentive pay to its full-time and part-time staff. In addition, MERC is interested in techniques to evaluate the success of the new performance-based pay method. The feasibility of implementing incentive pay for non-represented staff members is still being evaluated and will be included in MBL's "Part 2" report. It is MERC's goal to have a recommendation before the Commission in early Autumn.

Performance Evaluation

- Performance evaluation system tied to whole job content.
- Merit pay model that links employee "whole job" performance to pay and that allows the agency reliable budgetary control of the program.

ABOUT THE MBL GROUP

The MBL Group, LLC, is a consulting firm based in Portland, Oregon that focuses exclusively on Human Resources. MBL was founded in 1991 by Jim Morris and Paul Barber. Dianne Burt-Green, SPHR, and MBL's other principal, heads our compensation practice and has devoted her career to this specialty. Within the Human Resources arena, over 50% of MBL's consulting work is in compensation, including the design and delivery of base pay and performance management systems as well as profit sharing plans, management incentive plans, and commissioned sales plans.

The MBL's technical ability to develop pay and performance management plans, incentive systems, job structures, and surveys is matched with many years of general management experience. Each of the Principals of the company has held senior management positions in Human Resources for innovative companies in the Pacific Northwest.

MBL's clients have included public sector, hospitality, healthcare, technology, retail, manufacturing, and services companies as well as non-profit organizations. And, we understand the impact a compensation program has on the entity's culture and how those programs align with the enterprises mission, vision, and values.

MBL utilizes current published salary surveys from well established sources. MBL's compensation library is complete with up-to-date local, regional and national surveys. We are also skilled in understanding where to acquire published surveys for specialty areas if necessary.

In addition to published surveys, MBL has a large custom survey practice. MBL has expertise in conducting complex, custom surveys to supplement where published survey data does not exist. MBL has spent years in developing the survey technology and methodology that makes our survey practice sought after by all industry sectors.

MBL does not subscribe to "canned compensation packages or programs." We understand the "art" AND the "science" of designing compensation systems. Because compensation plans deal with numbers, it is often believed that compensation is just science. Nothing could be further from the truth. It takes years to develop the art of compensation system design. Each of the three MBL principals bring nearly 30 years of compensation design experience and have developed the fine balance of compensation "art" and "science."

Again, MBL was pleased to support MERC on this Classification, Compensation and Performance Evaluation Study. Dianne Burt-Green, SPHR, was the Principal Project Manager. MBL Associates, Alisyn Peters, Courtney Bush and Maddy Mahoney provided technical and analytical support to the project. All bios are included in Appendix #9.

Should you have further questions or require clarification on any element contained in this Executive Summary, please contact Dianne Burt-Green at (503) 224-7249 x13.

Appendix

1. Philosophy Meeting Minutes – October 27, 2006
2. Merit-Driven Compensation Presentation: January 26, 2007
3. Position Description Questionnaire – Full-time
4. Position Description Questionnaire – Part-time
5. Classification Description Template
6. MERC Job Titles – “New to Old”
7. Non-represented Employees Pay Grades & Ranges
8. Budget Impact Analysis
9. Annual Performance Evaluation Form
10. MBL Group Bios

APPENDIX 1

Philosophy Meeting Minutes
October 27, 2006



Philosophy Meeting Minutes

Compensation & Performance Management Study

October 27, 2006

In Attendance:

Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • Jeff Miller, MERC • Kathy Taylor, MERC • Julie Reed, MERC • Rachel Bertoni, MERC • Penny Knouf, MERC • Karen Totaro, OCC • Robyn Williams, PCPA • Lori Leyba, PCPA • Chris Bailey, Expo • Nathan Sykes, Metro/MERC • Jeff Blosser, OCC (unable to attend) 	<ul style="list-style-type: none"> • Lori Leyba, PCPA • Jim Benson, PCPA • Bruce Burnett, OCC • Lisa Brown, OCC • Lynn Hunter, OCC • Mark Williams, OCC • Randy Downs, Expo • Rachel Bertoni, MERC • Shiu Ram, MERC • Katy Barnett, Metro

MBL Group Consulting Team:

- Dianne Burt-Green, Principal
- Alisyn Peters, Associate
- Maddy Mahoney, Specialist

The purpose of these work sessions was to capture each group's thoughts and perspectives on the current state of the compensation and performance management systems in place today at MERC. The goal was to discuss what is working well, what is not working as well as it could, and recommendations on system changes and enhancements.

MBL facilitated the discussions and began with an overview of definitions to guide the discussions:

Quotes for the Day:

"Business history is littered with firms who got exactly what they paid for."

"Changing pay systems is not done to raise morale, for as many people will be unhappy with the new system as with the old."

System Definitions:

Performance Management System = The programs and procedures for managing, recognizing and communicating about employee performance.

Compensation System = All programs, plans, policies / procedures that impact total compensation for employees of MERC



Compensation Plan = A specific plan that describes / controls one aspect of cash compensation (e.g. Base Pay Plan, Bonus Plan, etc.)

Base Pay = The recurring base \$ paid to an employee on an hourly or monthly basis (base salary) for competencies, skills and on-going performance.

Incentive Pay = Cash compensation that is dependent on the achievement of certain results or objectives. Typically linked to the accomplishment of performance goals either of the organization, the business unit or the individual. By definition this is "at risk pay."

Benefits = The programs used to supplement the total compensation (e.g. health insurance, vacation, retirement plans, etc.). Indirect rewards typically given to employees as part of organizational membership.

Total Compensation = The total cash compensation paid to an employee – base pay and any incentive pay.

The emphasis of our work is to develop an integrated compensation system that maximizes return on, and encourages fiscal prudence in, one of the single largest expenses of MERC's business – PAYROLL!



Discussion Question #1:

Describe the current state of the performance management system at MERC:

- What works now and why?
- What would you want to change and why?
- Is the system well defined?
- Does the staff understand the performance management system?
- Does the performance management system encourage strong performance?

PROS

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • Self Evaluation 	
<p>Senior Leadership Team</p>	<p>Recognition Task Force</p>
<ul style="list-style-type: none"> • Staff is motivated to achieve goals • Goals communicate there is an expectation for greater contribution • Employees take pride in organization success • Last year there was greater emphasis on facility success vs. individual success • Organization goals boost morale (OCC) 	<ul style="list-style-type: none"> • Having a performance management system • Performance is tied to building goals • Quarterly reviews (in some areas) are being conducted • No surprises • Employees have input into developing own goals • System rewards employees for more than just showing up

CONS

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • No flexibility • Cumbersome process • Unrealistic / unachievable goals • Schedule of the system – write goals at the busiest time of year and not given enough time • External factors that affect goals are not taken into consideration. Unforeseen events trump established goals 	
<p>Senior Leadership Team</p>	<p>Recognition Task Force</p>
<ul style="list-style-type: none"> • If it is not in the goals it is not recognized • Only compensated for achieving goals • No way to factor in extraordinary achievement or work outside of goals • "How" I achieve the job is only a small component • Quality of work is not linked to the goal • Scale of goals – same job; different value on magnitude, disparity in magnitude • Level of difficulty/complexity of goal is not taken into consideration • No reward for day-to-day duties • Behavioral factors are not measured 	<ul style="list-style-type: none"> • Quarterly reviews inconsistent • Self evaluation may be redundant • Inconsistent scoring by managers • Goals are too quantity based • Goals are dependant on help from others to achieve • Ineffective form (prefer one-on-one) • Goals not developed mutually – counter productive goals amongst departments • Conflicting goals - individual goals are not aligned with overall organization success/goals



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<ul style="list-style-type: none">• No training on how to use the system created inconsistencies in measuring and developing goals• Complete next year's goals before current year's evaluation• Strictly about measuring results which creates an artificial rating• No system for reviewing part-time employees• New employees are evaluated on same scale as long term employees• Rating calibration – administrative support jobs difficult to measure	<ul style="list-style-type: none">• Seems to be an aversion to building stretch goals – promotes underachievement• Receive poor review if you do not reach your stretch goals• Too labor intensive• Inequity in scoring• Is perceived as a tool to control the budget• Does not recognize difference between good and bad performance• Measurable goals do not fit into organization/industry• Some jobs do not have "measurable" tasks, more process orientated. Goals were "made up" to fit into the process• System has lost its integrity• Timeliness of accomplishing goals is irrelevant to the work• We were sold on the system on the potential of high earnings then goals were set deliberately too high
---	--



Discussion Question #2:

Describe the current state of the total compensation system (base pay and incentive pay) at MERC:

- What works now and why?
- What would you want to change and why?
- Is the system well defined?
- Does the staff understand the compensation system?
- Does the compensation system link pay to performance?
- Is there a framework in which to manage the compensation **and** performance management systems?

BASE PAY PROS

Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • Long term managers are well paid • Expo Center at market • Convention Center above market, able to recruit supervisory positions from out of state 	<ul style="list-style-type: none"> • None given

BASE PAY CONS

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • Part-time pay schedules not maintained systematically 	
Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • Long term employees at market target are only receiving incentive • When at the maximum of market target receive a bonus that is heavily taxed • Increases partially based on project goals (not within control) • Average increases too high (above market trends) and unable to maintain • Administrative jobs undervalued to market. • "Public Glass Ceiling" at executive level creating compression problems 	<ul style="list-style-type: none"> • Messing with PFP scores in order to get raise • No mechanism for getting base pay increase • Need to stay within budget • Unique jobs with no market comparison and not represented in last study • If no increase in base pay then no increase in PERS • Do not understand pay structures



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INCENTIVE PAY PROS

Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • None given 	<ul style="list-style-type: none"> • None given

INCENTIVE PAY CONS

Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • Not really incentive pay. • Too complex, time consuming, and difficult to calculate. • Set goals intentionally low in order to get the most money, rather than goals that help the organization. • Does not include part-time staff. 	<ul style="list-style-type: none"> • Do not understand how incentive pay is calculated. • Use of incentive dollars to make up for base pay. (PCPA)

Discussion Question #3:

What are the primary goals of the current system? Do you agree with these goals? If not, what should they be?

Base Pay System

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • To pay at market 	
Senior Leadership Team	Recognition Task Force
	<ul style="list-style-type: none"> • Throw out the language "neither lags nor leads the market"; replace with a definite statement • We pay what the dynamic market is paying • Sustainability of MERC

Benefits

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • To be above market with PERS
--

Incentive / Bonus System

<p>Common to Both Groups</p> <ul style="list-style-type: none"> • To be slightly below market so that with PERS, Total Compensation will be slightly above market 	
Senior Leadership Team	Recognition Task Force
<ul style="list-style-type: none"> • Measure incentive separate from base 	



Performance Management

<p>Common to Both Groups</p> <ul style="list-style-type: none"> Continue the Self Evaluation process 	
<p>Senior Leadership Team</p>	<p>Recognition Task Force</p>
<ul style="list-style-type: none"> Overhaul system to measure competencies, behavior, and performance of current job duties 	<ul style="list-style-type: none"> Program administered the same across the board Accountability Reviewed annually Promote teamwork between different functions/facilities Promote customer service/experience – both internal and external customers

Discussion Question #4:

Who do you see as your competitors? What are comparable organizations? Do you recruit from the local area or from other regions of the state/country? Where does your departing staff go to work? All of this information helps us to define your "market".

Competitors / Comparable organizations / Market

<p>Common to Both Groups</p> <ul style="list-style-type: none"> Rose Quarter/Coliseum Washington Convention Center (Seattle) City of Houston – Performing Arts Center 	
<p>Senior Leadership Team</p>	<p>Recognition Task Force</p>
<ul style="list-style-type: none"> Private and public employers Hospitality industry Local and regional geographic area 	<ul style="list-style-type: none"> Seattle Center Washington County Spectrum Deschutes County Convention Center Denver Performing Arts Phoenix Spokane Vancouver, B.C Evergreen Fair Grounds Monroe Redmond Fair Grounds Salem Conference Center Puyallup Polk County



Discussion Question #5:

Do you feel / believe MERC's current compensation system is at, above, or below market ?

	<u>At Market</u>	<u>Above Market</u>	<u>Below Market</u>
	PCPA & Expo	OCC	MERC
Base Pay			
Incentive Pay	_____	_____	_____
Benefits	_____	<u>ALL</u>	_____
Total Compensation	_____	_____	_____

~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~

Thank you to all participants for your lively discussions, your perspectives and contributions to this important strategic discussion.

Respectfully submitted,

Dianne Burt-Green, SPHR
Principal
MBL Group, LLC

APPENDIX 2

Merit-Driven Compensation Presentation:
January 26, 2007

An Overview of Merit-Related Compensation

January 26, 2007
Dianne Burt-Green, SPHR
MBL Group, LLC



Today's Session:

- Proposing a paradigm shift!
- An overview of:
 - Merit-Driven Base Pay
 - Variable Pay Delivery Systems



Paradigm Shift

What do you see?

- A duck?
- A rabbit?
- Something else?



Source "Wikipedia"



"PPF" Paradigm Shift

- The "Duck":
 - Current PPF system
 - Base pay AND variable pay (bonuses) are tied to particular projects
- The "Rabbit":
 - Base pay focuses on everyday performance
 - Incentive pay focuses on achieving overall organizational success



Compensation Philosophy

Some Basic Principles



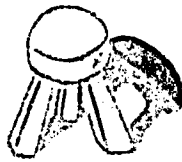
Strategic Compensation

- A** strategic compensation system should form a visible link between organizational objectives strategies and business metrics, while balancing the expectations of its employees with the costs to the employer, **AND**
- F**luid and flexible enough to meet changing economic and market conditions



Compensation's 3-Legged Stool

- What's happening in the external market?
- What's happening internally?
- The organization's ability to pay!



2 Categories of Compensation

The tools normally used to meet compensation objectives fall into 2 major categories:

I. Direct Compensation

1. Base salary
2. Premiums (overtime, shift differential, lead, buddy pay)
3. Incentives (a.k.a.; bonuses)



2 Categories of Compensation

II. Indirect Compensation

4. Employee benefits
5. Deferred compensation
6. Non-economic compensation



Merit-Driven Base Pay vs. Variable Pay

What's The Difference?



Merit-Driven Base Pay



- Cash compensation that an employee receives for "doing the job you hired them to do"
- Pay for performing on-going job duties as outlined in the job description
- Increases in base pay (cash compensation) are a direct result of an individual's performance



Incentive Pay





- Separate from base pay
- Linked to organizational objectives:
 - Company-wide
 - Business Unit
- Documented in a separate plan
- Typically "funded" plans
- Based on short-term (<1yr) or long-term (>1yr) performance measures






Types of Incentive Plans



- Bonus Plans
- Small Group (teams)
- Individual - sales, transactions
- Organization wide
 - Gain Sharing / Profit Sharing
 - Annual Work Plans
- Spot Award
- Technical Achievement - research
- Key Contributor / Key Contributions

Keep it Simple Whatever You Do!!!




Methods of Incentive Pay

- Cash 
- Ownership 
- Time off 



Today at MERC . . .

The PFP process mixes base pay and variable pay together and measures them with the same yardstick!

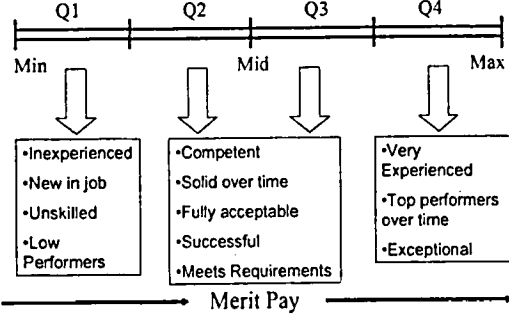




Linking Pay to Performance

How it's done!

Linking Performance to Pay





Min Q1 Q2 Q3 Q4 Max

Inexperienced
 •New in job
 •Unskilled
 •Low Performers

Competent
 •Solid over time
 •Fully acceptable
 •Successful
 •Meets Requirements



Very Experienced
 •Top performers over time
 •Exceptional

Merit Pay

Merit Matrix Design

	Greatly Exceeds	Exceeds	Meets	Below Expectations
Q1	Highest PA; low in grade			Lowest PA; low in grade
Q2		High PA; approaching MP	Competent PA; approaching MP	
Q3		High PA; above MP	Competent PA; above MP	
Q4	High in grade; highest PA			Highest in grade; low PA

Merit Matrix – SAMPLE!!!

Rating	Greatly Exceeds	Exceeds	Meets	Below Expect
1 st Quartile (Min. to Q2)	10%	7%	5%	2%
2 nd Quartile (Q2 to MP)	8%	6%	4%	1%
3 rd Quartile (MP to Q3)	6%	4%	3%	0%
4 th Quartile (Q3 to Max)	5%	3%	2%	0%

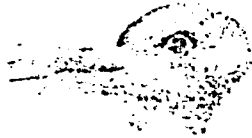


Total Compensation

- Base Pay
- Incentives / Bonus
- Benefits



Shift your Paradigm!



Thank you for your attention!

Questions?



APPENDIX 3

Position Description Questionnaire – Full-time



POSITION DESCRIPTION QUESTIONNAIRE – Full-Time

OUR MISSION:

To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly facilities

OUR VISION:

To be the acknowledged leader in public assembly facility management

PURPOSE

The purpose of this questionnaire is to give us the information necessary to develop a clear and concise understanding of the roles within MERC. The information you provide us will also assist in other human resources functions, such as recruiting, employee development, developing and administering performance management programs, and/or ensuring our compensation system is competitive and fair.

WE NEED YOUR HELP

This process hinges on gathering clear and accurate information about the different jobs within MERC. This is where we need your help: the people who know the job(s) best are the people who are doing the work. Therefore, we want to ask for your help to gather this critical information. Attached is a Position Description Questionnaire (PDQ).

INSTRUCTIONS

Please complete the attached PDQ. Answer each question carefully. Give clear, factual, and specific descriptions of your job duties so that a person unfamiliar with your job will be able to understand its contents. If you use technical jargon to describe a duty or function, please explain the terminology clearly.

There are five (5) sections to this questionnaire. As you complete this questionnaire, you will see instructions on how to fill out each section. If you need more space for your answers, attach additional sheets.

- Section I:** General Information
 - A. Position Information
 - B. Organization Chart
 - C. Position Objective
- Section II:** Duties & Responsibilities
 - A. Essential Functions
 - B. Secondary Functions
- Section III:** Scope & Accountability
 - A. Contacts
 - B. Decision Making
- Section IV:** Job Specifications
- Section V:** Physical Activities



Here are some general pointers to consider as you complete this PDQ:

- ◇ Avoid generalities.
- ◇ Use examples wherever you can. They help in clarifying what you do.
- ◇ If you use acronyms, spell out and provide an explanation of the term.
- ◇ Describe the job as it exists now rather than as it may be in the future or may have been in the recent past.
- ◇ Your own personal qualifications may exceed the job's requirements, so describe only what qualifications are necessary of the job incumbent for standard performance.

After you complete the attached PDQ, give it to your supervisor for review. Your supervisor may have questions or recommendations for changes. In such cases, your supervisor will consult with you to seek clarification and together, you and your supervisor may modify/revise sections where appropriate.

Please return the PDQ to your supervisor **no later than December 15, 2006.**

If you have questions about this process, please contact your manager / supervisor or Rachel Bertoni in MERC Human Resources, (503) 731-7844.



Position Description Questionnaire: Full-time

I. General Information

A. Position Information

Your Name: _____ Date: _____

Your Job Title: _____ Department: _____

Facility (*check one*): OCC PCPA Expo MERC Admin.

B. Organization Chart

Complete the following organization chart by identifying your position, who you report to and who reports to you (if anyone). Include the person's name and their position title. If you need additional space, use the back of this page:

My Manager/Supervisor:

My Position:

My Direct Reports:

C. Position Objective

This describes the overall purpose/function of your job. In two or three sentences, write a brief summary of the major duties and responsibilities of your position. Focus on end results. Another way to answer this question is to ask yourself, "Why does my job exist?"



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II. Duties & Responsibilities

The following section consists of two parts: The first part (A; page 4) covers the **essential** job functions; the second part (B; page 5) covers the **secondary** job functions. The combination of Essential **and** Secondary Functions should total 100%.

A. Essential Functions

Essential job functions are those duties that (1) you are required to perform, (2) your position exists to perform the function, (3) there are a limited number of other employees who are available to perform the function, and (4) the function is highly specialized and you are in the position due to your special expertise.

Below, list your essential job functions. Group them into major areas of responsibility and list them, in order of significance, beginning with the most important. Begin your statements with a verb; state what you do and why you do it (*refer to the list of action verbs on the last page of this PDQ*). Each function should consist of only one or two short sentences. In most instances 6-8 job functions should encompass all your essential job duties. Each essential function typically consumes more than 10% of your time overall.

Rank	% of time required (increments greater than or equal to 10% of your time)	Essential Functions: Tasks and Responsibilities
	20%	Example: Event Manager essential task/responsibility: Prepare diagrams, instructions and signs for each event and distribute to appropriate personnel.
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Essential Functions Percentage of Time



B. Secondary Functions

Secondary functions are those duties and responsibilities that are not essential to the primary focus of your job. Secondary functions are tasks and responsibilities that may occasionally be performed by others. Here again, begin your statements with a verb. Each function should consist of one or two short sentences. If additional space is needed, please attach another page. Each secondary function typically consumes less than 10% of your time overall.

Rank	% of time required (increments of less than 10% of your time)	Secondary Functions: Tasks and Responsibilities
	5%	Example: Event Manager secondary task/responsibility: Provide administrative support and perform routine clerical duties.
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Secondary Functions Percentage of Time

Essential & Secondary Functions Total Percentage of Time
(Essential and secondary functions should total 100%)



III. Scope & Accountability

A. Contacts

Internal: With what other jobs in the organization do you have regular contact and what is the purpose of these contacts? Describe the frequency of this contact and to what extent the communication is confidential or sensitive in nature.

Title of Person	Purpose of Contact

External: What external contacts does your job require on a regular basis? What is the purpose of these contacts? Describe the frequency of this contact and to what extent the communication is confidential or sensitive in nature.

Title of Person	Purpose of Contact

B. Decision Making Authority

Indicate the scope of decision-making required for this position:	
<input type="checkbox"/>	Work is guided by organizational policies and established strategies. Normally involves regular guidance and periodic review of goals and plans.
<input type="checkbox"/>	Work is subject to guidance and evaluation from management.
<input type="checkbox"/>	Work is subject only to broad guidance and review by the Executive Director and/or General Manager.

Comments:



IV. Job Specifications

A. Job Requirements

Summarize the specific knowledge, skills, and abilities your job requires. List the **minimums** in each of these categories. In other words, if you were recruiting to fill a job identical to yours, what background would you expect a successful job applicant to have? If a category does not apply, indicate "NA" (not applicable). For example, if you do not supervise anyone, you would indicate "NA" in box #8.

1.	<i>Knowledge of:</i>	
2.	<i>Skill in:</i>	
3.	<i>Ability to:</i>	
4.	<i>Required previous work experience (include # of years and type of experience):</i>	
5.	<i>Required degrees, licenses, diplomas, certifications:</i>	
6.	<i>Communication including written and verbal communication and the ability to make presentations:</i>	
7.	<i>Describe the MERC resources for which you are directly responsible (include inventory, equipment, budget, personnel, in approximate \$ figures):</i>	
8.	<i>Indicate the number of full-time and part-time staff this position directly supervises:</i>	



B. Special Job Conditions

Describe any special job conditions that apply to your position. Include amount of travel, substantial overtime, evening meetings, weekend work, on-call status, etc.

C. Other Comments

Is there anything else you think we should know about your position? Is there any trait or attribute that defines successful performance in this role that is not noted in another section?



**ADDENDUM: TO BE COMPLETED ONLY BY THOSE WHOSE JOBS REQUIRE
PHYSICAL ACTIVITIES REGULARLY**

V. Physical Activities

How much on-the-job time is spent in the following sensory / physical activities?

--- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Stand					
Walk					
Sit					
Hear					
Climb or balance					
Stoop, kneel, crouch or crawl					
Twist					
Bend					
Reach with hands and arms					
Taste or smell					
Use hands to manipulate, handle, or feel (e.g. typing, assembly)					

Does this position require weight be lifted? If so, how much and how often?

--- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Up to 10 pounds					
Up to 25 pounds					
Up to 50 pounds					
Up to 100 pounds					
More than 100 pounds					



Does this position require exposure to the following environmental conditions? If so, how much time?
 --- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Wet, humid conditions (non-weather)					
Work near moving mechanical parts					
Fumes or airborne particles					
Toxic or caustic chemicals					
Blood or other human bodily fluids					
Outdoor weather conditions					
Extreme cold (non-weather)					
Extreme heat (non-weather)					
Risk of electrical shock					
Work with explosives					
Risk of radiation					
Vibration					

Does this position have any special vision requirements?

- Close** (clear vision at 20 inches or less)
- Distance** (clear vision at 20 feet or more)
- Color** (ability to identify and distinguish colors)
- Peripheral** (ability to observe an area that can be seen up and down or to the left and right while eyes are fixed on a given point)
- Depth Perception** (three-dimensional vision, ability to judge distances and spatial relationships)
- Ability to Adjust Focus** (adjust eye to bring an object into sharp focus)
- No Special Vision Requirements**



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ACTION VERBS

Accelerate	Coach	Discipline	Format	Judge	Oppose	Refer	Store
Access	Code	Discontinue	Formulate	Judge	Organize	Refine	Study
Accomplish	Collaborate	Discuss	Fulfill	Justify	Orient	Reflect	Submit
Account	Collate	Dispatch	Fund	Kept	Originate	Register	Suggest
Achieve	Collect	Dispense	Gather	Know	Outline	Regulate	Summarize
Acquire	Combine	Display	Gauge	Label	Overhaul	Reinforce	Supervise
Adapt	Communicate	Distinguish	Generate	Launch	Oversee	Reject	Supply
Add	Compare	Distribute	Get	Lead	Package	Release	Support
Adjust	Compile	Divide	Give	Lecture	Participate	Rely	Survey
Administer	Complete	Draft	Govern	Lengthen	Perfect	Remit	Sustain
Adopt	Compute	Duplicate	Grade	Lift	Permit	Remove	Synthesize
Advise	Condense	Earn	Guard	Limit	Persuade	Repair	Systematize
Advocate	Conduct	Edit	Guide	Link	Phase in	Replace	Tabulate
Alleviate	Confer	Educate	Handle	List	Phase out	Report	Take
Allocate	Confirm	Effect	Hauls	Listen	Pick up	Represent	Target
Allow	Consolidate	Elaborate	Heighten	Load	Pinpoint	Reproduce	Teach
Alter	Construct	Elect	Help	Locate	Plan	Request	Tend
Amend	Consult	Elevate	Hires	Lubricate	Portray	Rescind	Terminate
Analyze	Continue	Eliminate	Host	Magnify	Post	Rescue	Test
Answer	Contrast	Employ	Hypothesizes	Maintain	Practice	Research	Testify
Apply	Control	Encourage	Identify	Manage	Predict	Reserve	Total
Appoint	Convert	Endorse	Illustrate	Manipulate	Prescribe	Resolve	Trace
Appraise	Convey	Engage	Implement	Manufacture	Present	Respond	Track
Approve	Cooperate	Enlist	Import	Map	Preserve	Retain	Trade
Arbitrate	Coordinate	Ensure	Improve	Market	Prevent	Retrieve	Train
Arrange	Copy	Entail	Include	Match	Procure	Review	Transact
Articulate	Correct	Enter	Incorporate	Maximize	Produce	Revise	Transcribe
Assemble	Correspond	Entertain	Increase	Measure	Program	Reward	Transfer
Assess	Count	Envision	Incur	Mediate	Prohibit	Salvage	Translate
Assign	Create	Escort	Index	Mend	Project	Sample	Transmit
Assist	Cut	Establish	Indicate	Merchandise	Promote	Scan	Transport
Audit	Decide	Estimate	Indict	Merge	Proofread	Schedule	Travel
Authorize	Dedicate	Evaluate	Individualize	Minimize	Propose	Score	Treat
Award	Define	Examine	Influence	Mix	Publicize	Screen	Turn
Balance	Delay	Excel	Inform	Model	Pull	Seal	Tutor
Bargain	Delegate	Exchange	Inform	Modify	Purchase	Search	Uncover
Batch	Deliberate	Exemplify	Initiate	Monitor	Pursue	Secure	Understand
Begin	Demonstrate	Exercise	Innovate	Motivate	Push	Select	Unify
Bring	Depend	Exhibit	Inspect	Move	Qualify	Sell	Update
Budget	Depict	Expand	Install	Navigate	Quantify	Send	Upgrade
Build	Describe	Experiment	Institute	Need	Question	Separate	Usher
Calculate	Design	Explain	Instruct	Negotiate	Rank	Serve	Utilize
Carry out	Designate	Extend	Interact	Net	Rate	Service	Validate
Categorize	Detail	Extract	Interpret	Nominate	Realize	Set up	Verbalize
Certify	Detect	Fabricate	Interview	Notify	Reap	Share	Verify
Check	Determine	Facilitate	Invent	Nullify	Rebuild	Show	Vitalize
Choose	Develop	Fasten	Inventory	Observe	Receive	Signal	Volunteer
Circulate	Devote	Feed	Investigate	Obtain	Recommend	Smell	Wax
Clarify	Diagnose	File	Involve	Occur	Reconcile	Solicit	Weigh
Classify	Differ	Find	Issue	Offer	Record	Solve	Widen
Clean	Differentiate	Finish	Itemize	Open	Recover	Sort	Work
Climb	Direct	Forecast	Join	Operate	Reduce	Stack	Write

APPENDIX 4

Position Description Questionnaire – Part-time



POSITION DESCRIPTION QUESTIONNAIRE – Part-Time

OUR MISSION:

To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly facilities

OUR VISION:

To be the acknowledged leader in public assembly facility management

PURPOSE

The purpose of this questionnaire is to give us the information necessary to develop a clear and concise understanding of the roles within MERC. The information you provide us will also assist in other human resources functions, such as recruiting, employee development, developing and administering performance management programs, and/or ensuring our compensation system is competitive and fair.

WE NEED YOUR HELP

This process hinges on gathering clear and accurate information about the different jobs within MERC. This is where we need your help: the people who know the job(s) best are the people who are doing the work. Therefore, we want to ask for your help to gather this critical information. Attached is a Position Description Questionnaire (PDQ). Its purpose is to capture details of each specific position within the MERC.

INSTRUCTIONS

Please complete the attached PDQ. Answer each question carefully. Give clear, factual, and specific descriptions of your job duties so that a person unfamiliar with your job will be able to understand its contents. If you use technical jargon to describe a duty or function, please explain the terminology clearly.

There are four (4) sections to this questionnaire. As you complete this questionnaire, you will see instructions on how to fill out each section. If you need more space for your answers, attach additional sheets.

- Section I:** General Information
 - A. Position Information
 - B. Organization Chart
 - C. Position Objective
- Section II:** Tasks & Duties
- Section III:** Job Specifications, Scope & Accountability
 - A. General
 - B. Decision Making
 - C. Experience & Training
 - D. Licenses or Certificates
- Section IV:** Physical Activities



Here are some general pointers to consider as you complete this PDQ:

- ◇ Avoid generalities.
- ◇ Use examples wherever you can. They help in clarifying what you do.
- ◇ If you use acronyms, spell out and provide an explanation of the term.
- ◇ Describe the job as it exists now rather than as it may be in the future or may have been in the recent past.
- ◇ Your own personal qualifications may exceed the job's requirements, but describe only what qualifications are necessary of the job incumbent for standard performance.

After you complete the attached PDQ, give it to your supervisor for review. Your supervisor may have questions or recommendations for changes. In such cases, your supervisory will consult with you to seek clarification and together, you and your supervisor may modify/revise sections where appropriate.

Please return the PDQ to your supervisor **no later than December 15, 2006.**

If you have questions about this process, please contact your manager / supervisor or Rachel Bertoni in MERC Human Resources, (503) 731-7844.



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Position Description Questionnaire: Part-time

I. General Information

A. Position Information

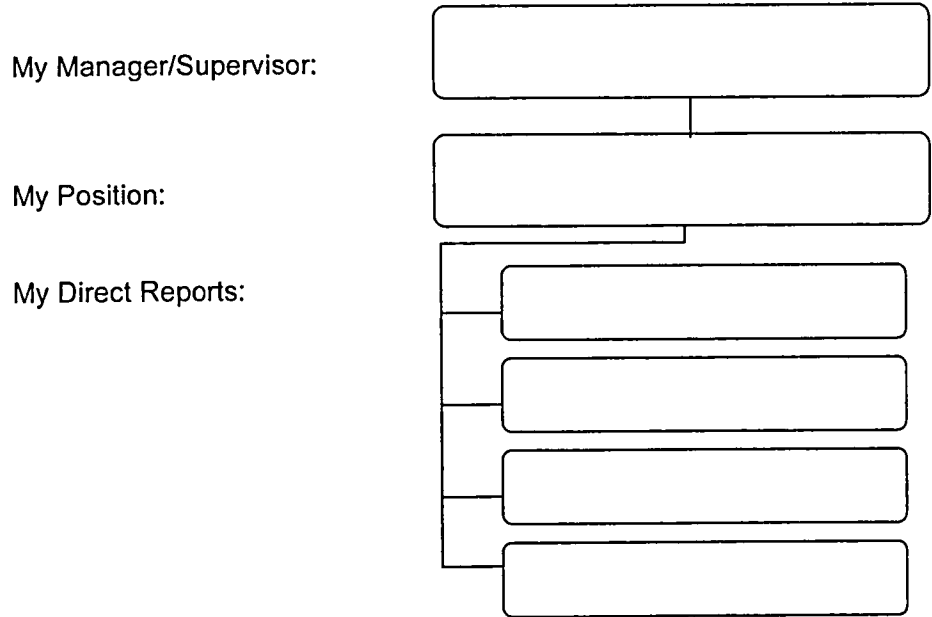
Your Name: _____ Date: _____

Your Job Title: _____ Department: _____

Facility (*check one*): OCC PCPA Expo MERC Admin.

B. Organization Chart

Complete the following organization chart by identifying your position; include who you report to, the person's name and their position title.



C. Position Objective

This describes the overall purpose/function of your job. In two or three sentences, write a brief summary of the major duties and responsibilities of your position. Focus on end results. Another way to answer this question is to ask yourself, "Why does my job exist"?



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II. Tasks & Duties

List and describe the tasks and duties of your job and indicate how often it is completed by checking the appropriate box. Next, fill in the amount of time it takes to complete the task, use HR for hours and MIN for minutes.

Tasks & Duties	Frequency	Amount of Time
Example: Part-time Marketing Coordinator: Tracks and processes all departmental accounting charges. Reconcile accounting monthly charges and creates accounting reports.	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	1 HR 30 MIN
Example: AV Production Person: Operate audio visual equipment in "show" environment, working as a crew member in conjunction with outside production companies.	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input checked="" type="checkbox"/> Per Event Only	2 HR 45 MIN
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	



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Tasks & Duties	Frequency	Amount of Time
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	
	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Per Event Only	



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III. Job Specifications, Scope & Accountability

A. General

From where do your work assignments generally come, and where or to whom do you send your completed work?

B. Decision Making Authority

What decisions about your work are you able to make on your own? List any *formal* guidelines, policies, procedures, technical manuals, regulations, etc., that exist to guide your work and with which you must comply in fulfilling your job responsibilities.

What decisions would you refer to your manager / supervisor before you take any action?

Indicate the scope of decision-making required for this position:

<input type="checkbox"/>	Decision-making is driven by policy and/or practice.
<input type="checkbox"/>	Decision-making is autonomous, but may require supervision at times.
<input type="checkbox"/>	Decision-making is routine in nature.
<input type="checkbox"/>	Decision-making is not a requirement of this position.

Comments:



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C. Specifications

Indicate the necessary experience and training required for this position.

D. Licenses or Certifications

Indicate the specific certifications or licenses required for this position.

E. Other Comments

Is there anything else you think we should know about your position?



**ADDENDUM: TO BE COMPLETED ONLY BY THOSE WHOSE JOBS REQUIRE
PHYSICAL ACTIVITIES REGULARLY**

IV. Physical Activities

How much on-the-job time is spent in the following sensory / physical activities?

--- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Stand					
Walk					
Sit					
Hear					
Climb or balance					
Stoop, kneel, crouch or crawl					
Twist					
Bend					
Reach with hands and arms					
Taste or smell					
Use hands to manipulate, handle, or feel (e.g. typing, assembly)					

Does this position require weight be lifted? If so, how much and how often?

--- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Up to 10 pounds					
Up to 25 pounds					
Up to 50 pounds					
Up to 100 pounds					
More than 100 pounds					



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Does this position require exposure to the following environmental conditions? If so, how much time?

--- Amount of Time ---

	None	Up to 25%	25 – 49%	50 – 74%	75 – 100%
Wet, humid conditions (non-weather)					
Work near moving mechanical parts					
Fumes or airborne particles					
Toxic or caustic chemicals					
Blood or other human bodily fluids					
Outdoor weather conditions					
Extreme cold (non-weather)					
Extreme heat (non-weather)					
Risk of electrical shock					
Work with explosives					
Risk of radiation					
Vibration					

Does this position have any special vision requirements?

- Close** (clear vision at 20 inches or less)
- Distance** (clear vision at 20 feet or more)
- Color** (ability to identify and distinguish colors)
- Peripheral** (ability to observe an area that can be seen up and down or to the left and right while eyes are fixed on a given point)
- Depth Perception** (three-dimensional vision, ability to judge distances and spatial relationships)
- Ability to Adjust Focus** (adjust eye to bring an object into sharp focus)
- No Special Vision Requirements**



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ACTION VERBS

Accelerate	Coach	Discipline	Format	Judge	Oppose	Refer	Store
Access	Code	Discontinue	Formulate	Judge	Organize	Refine	Study
Accomplish	Collaborate	Discuss	Fulfill	Justify	Orient	Reflect	Submit
Account	Collate	Dispatch	Fund	Kept	Originate	Register	Suggest
Achieve	Collect	Dispense	Gather	Know	Outline	Regulate	Summarize
Acquire	Combine	Display	Gauge	Label	Overhaul	Reinforce	Supervise
Adapt	Communicate	Distinguish	Generate	Launch	Oversee	Reject	Supply
Add	Compare	Distribute	Get	Lead	Package	Release	Support
Adjust	Compile	Divide	Give	Lecture	Participate	Rely	Survey
Administer	Complete	Draft	Govern	Lengthen	Perfect	Remit	Sustain
Adopt	Compute	Duplicate	Grade	Lift	Permit	Remove	Synthesize
Advise	Condense	Earn	Guard	Limit	Persuade	Repair	Systematize
Advocate	Conduct	Edit	Guide	Link	Phase in	Replace	Tabulate
Alleviate	Confer	Educate	Handle	List	Phase out	Report	Take
Allocate	Confirm	Effect	Hauls	Listen	Pick up	Represent	Target
Allow	Consolidate	Elaborate	Heighten	Load	Pinpoint	Reproduce	Teach
Alter	Construct	Elect	Help	Locate	Plan	Request	Tend
Amend	Consult	Elevate	Hires	Lubricate	Portray	Rescind	Terminate
Analyze	Continue	Eliminate	Host	Magnify	Post	Rescue	Test
Answer	Contrast	Employ	Hypothesizes	Maintain	Practice	Research	Testify
Apply	Control	Encourage	Identify	Manage	Predict	Reserve	Total
Appoint	Convert	Endorse	Illustrate	Manipulate	Prescribe	Resolve	Trace
Appraise	Convey	Engage	Implement	Manufacture	Present	Respond	Track
Approve	Cooperate	Enlist	Import	Map	Preserve	Retain	Trade
Arbitrate	Coordinate	Ensure	Improve	Market	Prevent	Retrieve	Train
Arrange	Copy	Entail	Include	Match	Procure	Review	Transact
Articulate	Correct	Enter	Incorporate	Maximize	Produce	Revise	Transcribe
Assemble	Correspond	Entertain	Increase	Measure	Program	Reward	Transfer
Assess	Count	Envision	Incur	Mediate	Prohibit	Salvage	Translate
Assign	Create	Escort	Index	Mend	Project	Sample	Transmit
Assist	Cut	Establish	Indicate	Merchandise	Promote	Scan	Transport
Audit	Decide	Estimate	Indict	Merge	Proofread	Schedule	Travel
Authorize	Dedicate	Evaluate	Individualize	Minimize	Propose	Score	Treat
Award	Define	Examine	Influence	Mix	Publicize	Screen	Turn
Balance	Delay	Excel	Inform	Model	Pull	Seal	Tutor
Bargain	Delegate	Exchange	Inform	Modify	Purchase	Search	Uncover
Batch	Deliberate	Exemplify	Initiate	Monitor	Pursue	Secure	Understand
Begin	Demonstrate	Exercise	Innovate	Motivate	Push	Select	Unify
Bring	Depend	Exhibit	Inspect	Move	Qualify	Sell	Update
Budget	Depict	Expand	Install	Navigate	Quantify	Send	Upgrade
Build	Describe	Experiment	Institute	Need	Question	Separate	Usher
Calculate	Design	Explain	Instruct	Negotiate	Rank	Serve	Utilize
Carry out	Designate	Extend	Interact	Net	Rate	Service	Validate
Categorize	Detail	Extract	Interpret	Nominate	Realize	Set up	Verbalize
Certify	Detect	Fabricate	Interview	Notify	Reap	Share	Verify
Check	Determine	Facilitate	Invent	Nullify	Rebuild	Show	Vitalize
Choose	Develop	Fasten	Inventory	Observe	Receive	Signal	Volunteer
Circulate	Devote	Feed	Investigate	Obtain	Recommend	Smell	Wax
Clarify	Diagnose	File	Involve	Occur	Reconcile	Solicit	Weigh
Classify	Differ	Find	Issue	Offer	Record	Solve	Widen
Clean	Differentiate	Finish	Itemize	Open	Recover	Sort	Work
Climb	Direct	Forecast	Join	Operate	Reduce	Stack	Write

APPENDIX 5

Classification Description Template



Classification Description

OUR VISION:

To be the acknowledged leader in public assembly venue management in the region

OUR MISSION:

To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly venues

OUR VALUES:

Respect ~ Excellence ~ Teamwork ~ Innovation ~ Community

Job Title		Bargaining Unit	Non-represented
Functional Job Family		Classification #	(####)
FLSA	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	Salary Grade #	
Position Status	<input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Revision Date	March 2007

Summary:

Summary of the major duties and responsibilities of the position.

Reasonable Accommodations:

To perform this job successfully, an individual must be able to perform each essential duty and physical demands satisfactorily with or without a reasonable accommodation.

Essential Functions:

- *Examples of duties tasks and responsibilities that are performed on a regular and recurring basis and are critical to the successful performance of the job.*
- *Other duties which may be necessary or desirable to support the agency's success.*

Secondary Functions:

- *Tasks that are not as essential to the primary focus of the job. Secondary tasks are those that can occasionally be performed by others and includes any tasks or responsibilities that are seasonal or cyclical in nature.*

Supervisory Responsibilities:

Executive Leadership

This position achieves success by providing leadership and direction for the agency and assigned facility. The position is responsible to ensure that subordinate work groups have clear direction about the agency's goals, so that diverse work groups are able to function effectively and in concert to achieve those goals together. The incumbent is responsible to carry out the full spectrum of leadership responsibilities in accordance with the agency's policies and applicable laws, and to ensure that subordinate managers and supervisors provide leadership to their respective workgroups. Responsibilities include hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems. This position provides essential support and specialized industry advice to the MERC Commission.

Senior Management

This position achieves success through subordinate supervisors, by ensuring that they have the necessary leadership and tools to achieve success. The incumbent is responsible to carry out the full spectrum of management responsibilities in accordance with the agency's policies and applicable laws, and to ensure subordinate supervisors also carry out supervisory duties appropriately. Responsibilities include hiring, and



training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Supervisor

This position functions primarily as a first-line supervisor, ensuring that subordinate staff have clear work direction and guidance. The incumbent is responsible to carry out the full spectrum of supervisory responsibilities in accordance with the agency's policies and applicable laws. Responsibilities include hiring and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Leads

This position has no supervisory responsibilities but provides lead direction, guidance and coaching to members of the work group. Responsibilities include scheduling members of the work group, orienting and training others in applicable policies, procedures and techniques, and providing assistance to management in achieving work group success.

Administrative/Line Staff

This position has no supervisory responsibility but may provide leadership and guidance to volunteers and/or temporary staff and/or assist with orientation of new members of the work group.

Individual Contributors - Management level position w/no direct reports

This position is primarily an individual contributor. This position has no supervisory responsibilities but provides guidance and leadership on specialized areas to internal clients, and to less experienced members of the work group. This position provides expert staff support to the MERC Commission as needed.

Education and/or Experience; Certificates, Licenses, and Registrations:

- A listing of minimum qualifications that must be met by the employee to be able to perform at a competent level.
- List type and years of work experience.
- List degrees, licenses or certifications desirable or required.
- XX Degree with major course work in XX, and
- A minimum of XX (#) years of experience in XX, or
- An equivalent combination of education, experience and training that would provide the knowledge, skills and abilities required for the successful performance of the essential job duties.
- Must possess a current and valid Cardiopulmonary Resuscitation Certification. - **Medical Specialist, Security Manager, Check Room, House Manager, Event Managers only**

Necessary Knowledge, Skills and Abilities:

- Summarizes the specific knowledge, skills and abilities required to perform the position.

Physical Demands / Work Environment:

- Outlines the physical activities required to perform the position; bending, lifting, sitting, walking, exposure to heat, noise, humidity, etc.
- Environment and physical requirements of the position, as necessary.

General office environment: Majority of work is completed in a general office environment with exposure to moderate levels of noise in a well-lit, well-ventilated and moderately paced environment; Continuously required to read computer screen.

"None" = Omit for job description

"Up to 25%" = "Rarely"

"25-49%" = "Occasionally"

"50-74%" = "Frequently"

"75-100%" = "Continuously"



- ...required to stand and/or walk for extended periods of time.
- ...required to hear and/or respond to verbal/audio cues.
- ...required to see and/or respond to visual cues.
- ...required to reach with hands and arms.
- ...required to perform repetitive motions of hands and wrists.
- ...required to lift, push, pull and/or carry objects up to XX pounds.
- ...required to stoop, kneel, crouch or crawl.
- ...required to twist and/or bend.
- ...required to smell and/or taste.
- ...exposed to toxic or caustic chemicals.
- ...exposed to fumes or airborne particles.
- ...exposed to blood or other human bodily fluids.
- ...exposed to outdoor weather conditions.
- ...works near or around electricity.

"MERC believes that each employee makes a significant contribution to our overall success. That contribution should not be limited by the assigned responsibilities. Therefore, this Classification Description is designed to outline primary duties, qualifications and job scope, but not limit the incumbent or MERC, to just the specific work identified. It is our expectation that each employee will offer his or her services wherever and whenever necessary to ensure the success of our endeavors."

APPROVED:

MERC General Manager

Date

MERC Human Resources Manager

Date

APPENDIX 6

MERC Job Titles – “New to Old”

Job #	Match	New MERC Job Title	MERC Job Family	NEW FLSA STATUS: Ex or Nex	Notes	Old Title	Old FLSA Status
1	8350	Account Executive	Sales & Marketing	EX		Account Executive	EX
2	8013	Accountant	Accounting & Finance	EX		Accountant	EX
3	8015	Accounting Technician I	Accounting & Finance	NEX	ADDED 4/6/07	Administrative Technician - Accounting	
4	8021	Accounting Technician II	Accounting & Finance	NEX	Combined w/ #8405	Management Technician	NEX
5	8022	Administrative Assistant	Administrative Support	NEX	Combined w/ #8405 and #8046	Administrative Technician II	NEX
6	8046	Administrative Assistant	Administrative Support	NEX	Combined w/ #8022 and #8405	Administrative Assistant I	NEX
7	8405	Administrative Assistant	Accounting & Finance	NEX	Combined w/ #8022 and #8046	Operations Accounting Coordinator	EX
8	8370	Admissions Staffing Manager	Events	EX		Admissions Staffing Manager	EX
9	8220	Assistant Event Services Manager	Events	EX		Assistant Event Services Manager	EX
10	8307	Assistant Executive Director - OCC	Executive Leadership	EX		OCC Assistant Director	EX
11	8039	Assistant Executive Director - PCPA	Executive Leadership	EX		PCPA Assistant Executive Director	EX
12	8317	Assistant Operations Manager - Expo Center	Operations	EX		Assistant Operations Manager - Expo Center	EX
13	8314	Assistant Operations Manager - PCPA	Operations	EX		Assistant Operations Manager	EX
14	8481	Asst. Ticket Services Manager	Guest Services	EX		Ticket Services Coordinator	EX
15	8150	Audio Visual Production Assistant	Operations	NEX		Audio Visual Production Person	NEX
16	8509	Audio Visual Supervisor	Operations	EX		Audio Visual Supervisor	EX
17	8510	Audio Visual Technician	Operations	NEX		Audio Visual Technician	NEX
18	8511	Audio Visual Technician Lead	Operations	EX		Audio Visual Technician Lead	EX
19	8011	Budget Manager	Accounting & Finance	EX		Budget Analyst	EX
20	New	Business Systems Analyst	Information Technology	EX	New Position		?
22	8230	Computer Systems Administrator	Information Technology	EX		Computer Systems Administrator	EX
23	8290	Construction Division Manager	Operations	EX		Construction/Capital Projects Manager	EX
24	8288	Construction Project Manager	Operations	EX		Construction Coordinator	EX
25	8012	Controller	Accounting & Finance	EX		Accounting Manager	EX
26	8285	Custodian	Operations	NEX		Operations Event Custodian	NEX
27	8304	Deputy General Manager	Executive Leadership	EX		MERC Director of Admin./Finance Officer	EX
28	8295	Director - Expo Center	Executive Leadership	EX		Expo Director	EX
29	8302	Director of Event Services	Events	EX		Director of Event & Special Services	EX
30	8306	Director of Operations	Operations	EX		Director of Operations	EX
31	8303	Director of Sales & Marketing	Sales & Marketing	EX		Director of Sales & Marketing	EX
32	8180	Event Manager	Events	EX		Event Manager II	EX
33	8030	Event Receptionist	Events	NEX		Secretary I - PT	NEX
34	8205	Event Services Manager	Events	EX		Event Services Manager	EX
35	8045	Executive Assistant	Administrative Support	NEX	Combined w/ #8047	Administrative Assistant II	NEX
36	8047	Executive Assistant	Administrative Support	NEX	Combined w/ #8045	Administrative Assistant III	NEX
37	8475	Executive Director - OCC	Executive Leadership	EX		Executive Director - OCC	EX
38	8110	Executive Director - PCPA	Executive Leadership	EX		PCPA Executive Director	EX
39	8494	Expo Center Utility Lead	Operations	NEX		Expo Utility Lead	NEX
40	8210	Facilities Maint & Construction Supv	Operations	EX		Building Maintenance Supv	EX
41	8252	Facility & Technical Services Supervisor	Operations	NEX		Facility & Technical Services Supervisor	NEX
42	8402	Graphic Designer	Sales & Marketing	EX		Graphic Designer II	EX
43	8178	House / Event Manager	Events	NEX	Combined w/ #8200	Event Manager I - PT	NEX
44	8200	House / Event Manager	Events	NEX	Combined w/ #8178	House Manager	NEX
45	8158	Human Resources Manager - MERC	Human Resources	EX		Human Resources Manager - MERC	EX
46	8232	Information Technology Manager	Information Technology	EX		Information Systems Supervisor	EX

Job #	Match	New MERC Job Title	MERC Job Family	NEW FLSA STATUS: Ex or Nex	Notes	Old Title	Old FLSA Status
47	8262	Lead Stagedoor Watchperson	Operations	NEX		Lead Stagedoor Watchperson	NEX
48	8168	Maintenance Supervisor	Operations	EX		Maintenance Supervisor - OCC	EX
49	8639	Marketing & Promotions Coordinator I	Sales & Marketing	NEX		Marketing & Promotions Coordinator I	NEX
50	8005	Marketing & Promotions Coordinator II	Sales & Marketing	NEX		Promotions Materials Coordinator	NEX
51	8028	Marketing & Web Services Manager	Sales & Marketing	EX		Marketing Information Services Manager	EX
52	8120	Medical Specialist	Guest Services	NEX		Medical Specialist	NEX
53	8280	Operations Coordinator-PCPA	Operations	EX		Operations Coordinator	NEX
54	8164	Operations Manager - Expo Center	Operations	EX		Operations Manager I	EX
55	8165	Operations Manager - PCPA	Operations	EX		Operations Manager II	EX
56	8162	Operations Mgr - Hskpg & Setup	Operations	EX		Operations Mgr - Hskpg & Setup	EX
57	8163	Operations Mgr - Tech'l Srvs	Operations	EX		Operations Mgr - Tech'l Srvs	EX
58	New	Procurement Analyst	Accounting & Finance	EX	New Position		?
59	8027	Public Affairs Manager	Public Affairs	EX		Marketing & Communication Manager	EX
60	8010	Receptionist	Administrative Support	NEX	Combined w/ #8040	Secretary II	NEX
61	8040	Receptionist	Administrative Support	NEX	Combined w/ #8010	Secretary II - PT	NEX
62	8034	Sales & Booking Manager - PCPA	Sales & Marketing	EX		Assistant Sales & Ticket Services Manager	EX
63	8057	Sales & Events Manager	Sales & Marketing	EX		Sales & Events Manager	EX
64	8035	Sales Manager	Sales & Marketing	EX	Combined w/ #8051	Sales Manager	EX
65	8051	Sales Manager	Sales & Marketing	EX	Combined w/ #8035	Booking Coordinator	EX
66	8515	Security Manager	Guest Services	EX		Security Manager	EX
67	8215	Senior Event Manager	Events	EX		Senior Event Manager	EX
68	8185	Senior Operations Supervisor	Operations	EX		Senior Operations Supervisor - OCC	EX
69	8128	Services Sales Coordinator I	Sales & Marketing	NEX		Facility Services Sales Coordinator	NEX
70	8507	Services Sales Coordinator II	Sales & Marketing	EX		Audio Visual Sales Coordinator	EX
71	8245	Setup Supervisor-OCC	Operations	EX		Setup Supervisor-OCC	EX
72	8410	Stage Supervisor	Operations	EX		Stage Supervisor	EX
73	8255	Stagedoor Watchperson	Operations	NEX		Stagedoor Watchperson	NEX
74	8250	Telecom & Info Systems Technician	Information Technology	NEX		Telecom & Info Systems Technician	NEX
75	8140	Ticket Seller Supervisor	Guest Services	NEX		Ticket Services Supervisor 2 - PT	NEX
76	8480	Ticket Services Manager	Guest Services	EX		Ticket Services Supervisor	EX
77	8234	Ticketing & Parking Services Manager	Guest Services	EX		Ticketing/Parking Services Manager	EX
78	8125	Volunteer Services Coordinator	Guest Services	EX	Combined w/ #8375	Volunteer Services Coordinator - FT	EX
79	8375	Volunteer Services Coordinator	Guest Services	NEX	Combined w/ #8125	Volunteer Coordinator - PT	EX
	Obsolete/Delete				Obsolete/Delete		
	2178	Event Manager - Temp			8316	Assistant Ops Manager Hskpg and Setup	
	2405	Operations Accounting Coord - Temp			8316	Asst Ops Manager Tech Services	
	8016	Admin Tech Clerical			8374	Assistant Volunteer Coordinator	
	8017	Admin Tech Events			8374	Asst Volunteer Coord	
	8019	Marketing Coordinator			8394	Multi Media Services Supervisor	
	8032	Senior Sales Manager			8394	Multi-Media Services Supervisor	
	8036	Sales & Ticket Services Manager			8400	Multi Media Services Assistant	
	8041	Secretary MERC Temp			8400	Multi-Media Services Asst	
	8055	Sales & Marketing Manager			8425	Construction/Capital Project Asst Mgr	
	8179	Event Manager I - F/T			8529	Receptionist/Secretary - Temp	
	8271	Checkroom Attendant - Temp			8550	House Manager - Temp	
	8284	Operations Event Custodian - Temp			8565	Seat Marker ??????	
	8315	Asst Ops Manager Hskp & Setup					

APPENDIX 7

Non-represented Employees Pay Grades & Ranges

MERC Non-Represented Employees Pay Grades & Ranges - FINAL

Pay Grade	Job Code #	Position Title	FLSA	Hire / Entry Rate	1 Year Rate	2 Year Rate	% Between Step 1 & 2	% Between Step 2 & 3	Spread	MP Steps
Part-Time Pay Grades										
PT1	8285	Custodian	Nex	\$23,625	\$24,313	\$25,000	2.9%	2.8%	5.8%	10%
	8030	Event Receptionist	Nex	\$11.36	\$11.69	\$12.02				
	8255	Stagedoor Watchperson	Nex							
PT2	(open)		Nex	\$26,000 \$12.50	\$26,750 \$12.86	\$27,500 \$13.22	2.9%	2.8%	5.8%	10%
PT3	8040	Administrative Assistant - PT	Nex	\$28,600	\$29,425	\$30,250	2.9%	2.8%	5.8%	12%
	8639	Marketing & Promotions Coord I	Nex	\$13.75	\$14.15	\$14.54				
	8120	Medical Specialist	Nex							
PT4	8140	Ticket Seller Supervisor	Nex	\$32,050 \$15.41	\$32,975 \$15.85	\$33,900 \$16.30	2.9%	2.8%	5.8%	12%
PT5	8150	Audio Visual Production Assistant	Nex	\$35,900	\$36,925	\$37,950	2.9%	2.8%	5.7%	12%
	8005	Marketing & Promotions Coord II	Nex	\$17.26	\$17.75	\$18.25				
	8375	Volunteer Services Coordinator	Nex							
PT6	8178	House / Event Manager	Nex	\$40,200	\$41,350	\$42,500	2.9%	2.8%	5.7%	-
	8200	House / Event Manager	Nex	\$19.33	\$19.88	\$20.43				

Pay Grade	Dept	Position Title	FLSA	Minimum	Q2	Midpoint	Q3	Maximum	Spread	MP Steps
Non-Exempt Full-Time Staff										
20	(open)		Nex	\$23,913 \$11.50	\$25,707 \$12.36	\$27,500 \$13.22	\$29,293 \$14.08	\$31,087 \$14.95	30%	10%
21	8015	Accounting Technician I	Nex	\$26,304	\$28,277	\$30,250	\$32,223	\$34,196	30%	10%
		Receptionist	Nex	\$12.65	\$13.59	\$14.54	\$15.49	\$16.44		
22	8494	EXPO Center Utility Lead	Nex	\$28,913	\$31,082	\$33,250	\$35,418	\$37,587	30%	10%
		Lead Stagedoor Watchperson	Nex	\$13.90	\$14.94	\$15.99	\$17.03	\$18.07		
23	8022	Administrative Assistant	Nex	\$31,064	\$33,782	\$36,500	\$39,218	\$41,936	35%	10%
		Administrative Assistant	Nex	\$14.93	\$16.24	\$17.55	\$18.85	\$20.16		
		Administrative Assistant	Nex							
24	8021	Accounting Technician II	Nex	\$34,043	\$37,021	\$40,000	\$42,979	\$45,957	35%	12%
		Executive Assistant	Nex	\$16.37	\$17.80	\$19.23	\$20.66	\$22.09		
		Executive Assistant	Nex							
		Services Sales Coord I	Nex							
25	8510	Audio Visual Technician	Nex	\$38,085 \$18.31	\$41,418 \$19.91	\$44,750 \$21.51	\$48,082 \$23.12	\$51,415 \$24.72	35%	12%
26	8250	Telecom & Info Systems Tech	Nex	\$41,667 \$20.03	\$45,833 \$22.04	\$50,000 \$24.04	\$54,167 \$26.04	\$58,333 \$28.04	40%	12%
27	(open)		Nex	\$46,667 \$22.44	\$51,333 \$24.68	\$56,000 \$26.92	\$60,667 \$29.17	\$65,333 \$31.41	40%	-

MERC Non-Represented Employees Pay Grades & Ranges - FINAL

Pay Grade	Dept	Position Title	FLSA	Minimum	Q2	Midpoint	Q3	Maximum	Spread	MP Steps
Exempt Full-Time Staff										
A	(open)		Ex	\$33,333 \$16.03	\$36,667 \$17.63	\$40,000 \$19.23	\$43,333 \$20.83	\$46,667 \$22.44	40%	14%
B	8013	Accountant	Ex	\$38,000	\$41,800	\$45,600	\$49,400	\$53,200	40%	14%
	8511	AV Tech. Lead	Ex	\$18.27	\$20.10	\$21.92	\$23.75	\$25.58		
	8230	Computer Systems Administrator	Ex							
	8280	Operations Coordinator-PCPA	Ex							
	8507	Services Sales Coord II	Ex							
	8125	Volunteer Services Coordinator	Ex							
C	8350	Account Executive	Ex	\$42,367	\$47,134	\$51,900	\$56,666	\$61,433	45%	14%
	8370	Admissions Staffing Mgr	Ex	\$20.37	\$22.66	\$24.95	\$27.24	\$29.53		
	8481	Asst. Ticket Services Manager	Ex							
	8180	Event Manager	Ex							
	8402	Graphic Designer	Ex							
	New	Procurement Analyst	Ex							
	8035	Sales Manager	Ex							
	8051	Sales Manager	Ex							
	8245	Setup Supervisor-OCC	Ex							
D	8317	Asst Operations Manager - Expo Center	Ex	\$48,163	\$53,582	\$59,000	\$64,418	\$69,837	45%	14%
	8509	AV Supervisor	Ex	\$23.16	\$25.76	\$28.37	\$30.97	\$33.58		
	8252	Facility & Technical Services Supervisor	Ex							
	8210	Facility Maint & Construction Supervisor	Ex							
	8168	Maintenance Supervisor	Ex							
	8215	Sr. Event Manager	Ex							
	8185	Sr. Set-up Supervisor	Ex							
	8410	Stage Supervisor	Ex							
	8480	Ticket Services Manager	Ex							
E	8314	Assistant Operations Manager - PCPA	Ex	\$54,694	\$60,847	\$67,000	\$73,153	\$79,306	45%	16%
	8220	Asst. Event Services Mgr	Ex	\$26.30	\$29.25	\$32.21	\$35.17	\$38.13		
	New	Business System Analyst	Ex							
	8288	Construction Project Manager	Ex							
	8028	Marketing & Web Services Manager	Ex							
	8162	Operations Mgr - Hskpg & Setup	Ex							
	8163	Operations Mgr - Tech'l Srvs	Ex							
	8515	Security Manager	Ex							
	8234	Ticketing & Parking Services Mgr	Ex							
F	8011	Budget Manager	Ex	\$62,400	\$70,200	\$78,000	\$85,800	\$93,600	50%	16%
	8290	Construction Division Manager	Ex	\$30.00	\$33.75	\$37.50	\$41.25	\$45.00		
	8012	Controller	Ex							
	8302	Director of Event Services	Ex							
	8303	Director of Sales and Marketing	Ex							
	8205	Events Services Manager - PCPA	Ex							
	8158	Human Resources Manager - MERC	Ex							
	8232	Information Technology Manager	Ex							
	8164	Operations Manager - Expo Center	Ex							
	8027	Public Affairs Manager	Ex							
	8034	Sales & Booking Manager - PCPA	Ex							
	8057	Sales & Events Manager	Ex							
G	8306	Director of Operations	Ex	\$72,400	\$81,450	\$90,500	\$99,550	\$108,600	50%	16%
	8165	Operations Manager - PCPA	Ex	\$34.81	\$39.16	\$43.51	\$47.86	\$52.21		
H	8039	Asst. Exec. Director - PCPA	Ex	\$84,000	\$94,500	\$105,000	\$115,500	\$126,000	50%	16%
	8307	Asst. Executive Director - OCC	Ex	\$40.38	\$45.43	\$50.48	\$55.53	\$60.58		
I	8295	Director - Expo Center	Ex	\$97,600	\$109,800	\$122,000	\$134,200	\$146,400	50%	16%
	8304	Deputy General Manager	Ex	\$46.92	\$52.79	\$58.65	\$64.52	\$70.38		
J	8475	Executive Director - OCC	Ex	\$113,600	\$127,800	\$142,000	\$156,200	\$170,400	50%	-
	8110	Executive Director - PCPA	Ex	\$54.62	\$61.44	\$68.27	\$75.10	\$81.92		

APPENDIX 8

Budget Impact Analysis

MERC Compensation Study - Full-Time Staff Budget Impact Analysis

MERC Annualized Payroll as of March 2007

\$888,908	Non-Exempt Staff
\$4,199,329	Exempt Staff
\$5,088,237	Total Staff

New Ranges	# Staff	Annualized Midpoints	Compa-Ratio	Amount Below Minimum	Amount Below Cr	Amount Below Midpoint	Amount Below Cr	Amount Above Maximum
Non-Exempt Staff	23	\$868,250	102.4%	\$1,207	\$8,692	\$24,268	\$57,959	\$2,758
Exempt Staff	66	\$4,380,800	95.9%	\$12,035	\$96,416	\$311,528	\$619,872	\$9,962
Total Staff	89	\$5,249,050	96.9%	\$13,242	\$105,108	\$335,796	\$677,831	\$12,720

Percent of Payroll

Non-Exempt Staff	0.1%	1.0%	2.7%	6.5%	0.3%
Exempt Staff	0.3%	2.3%	7.4%	14.8%	0.2%
Total Staff	0.3%	2.1%	6.6%	13.3%	0.2%

Individuals Affected

Non-Exempt Staff	1	3	10	16	2
Exempt Staff	6	19	40	50	1
Total Staff	7	22	50	66	3

The above totals ARE cumulative.

"Compa-Ratio" is salaries divided by midpoint; reflective of relative position to market average

MERC Compensation Study - Part-Time Staff Budget Impact Analysis

**MERC Annualized
Payroll as of 3/07**

\$1,213,057

Part-Time Staff (calculated @ 1040 average hours per year)

\$1,161

Total hourly rates

New Ranges	Staff	Annualized Midpoints	Compa- Ratio	Amount Below Minimum/ hour	Amount Below Step 2/ hour	Amount Below Step 3/hour	Amount Above Step 3/hour
Part-Time Staff	89	\$1,357	85.6%	\$147	\$174	\$205	\$9
			Individuals Affected	63	66	74	15

The above totals ARE cumulative.

Job Title	Job Code	Avg 2006 Hours per Employee	# 2007 Employees	Avg \$ below Step 1	Estimated 2007 Budget Impact
Promotional Materials Coord	8005	575	1	\$0.00	\$0
Secretary II PT	8010/8040	222	3	\$1.13	\$748
Secretary I PT	8030	66	9	\$1.57	\$931
Medical Specialist	8120	243	13	\$0.91	\$2,872
Ticket Services Super 2	8140	266	16	\$0.31	\$1,312
AV Production Person	8150	653	16	\$6.29	\$65,709
Event Manager I	8178	836	3	\$0.56	\$1,397
House Manager	8200	962	5	\$1.33	\$6,403
Stagedoor Watchperson	8255	500	16	\$0.56	\$4,441
Operations Event Custodian	8285	1273	5	\$1.26	\$8,008
Volunteer Coord PT	8375	872	1	\$3.10	\$2,701
Marketing Coord	8639	1227	1	\$0.00	\$0
Total Budget Impact					\$94,524

"Compa-Ratio" is salaries divided by midpoint; reflective of relative position to market average

APPENDIX 9

Annual Performance Evaluation Form



Annual Performance Evaluation

OUR VISION:

To be the acknowledged leader in public assembly venue management in the region

OUR MISSION:

To enhance the livability and economic vitality of the metropolitan region through sound stewardship, expert management and creative development of the region's public assembly venues

OUR VALUES:

Respect ~ Excellence ~ Teamwork ~ Innovation ~ Community

Employee Name		Job Title	
Supervisor Name		Department	
Review Period			

This position supports the following MERC Strategic Business Goals: (Varies by job) <ul style="list-style-type: none"> ➤ <i>Expertly manage world class public assembly venues</i> ➤ <i>Engage employees in creating an exceptional workplace</i>
--

Job Responsibilities	Rating/Comments
<i>These will vary by specific job and will come out of the job description—not intended to change significantly each year.</i>	
<i>These will vary by specific job and will come out of the job description—not intended to change significantly each year.</i>	
<i>These will vary by specific job and will come out of the job description—not intended to change significantly each year.</i>	
<i>These will vary by specific job and will come out of the job description—not intended to change significantly each year.</i>	
<i>These will vary by specific job and will come out of the job description—not intended to change significantly each year.</i>	



These will vary by specific job and will come out of the job description—not intended to change significantly each year.

Core Competencies	Rating/Comments
<p>Respect: Employee treats colleagues, customers and guests with care and appreciation. Employee seeks to understand the perspective of others and treats colleagues as partners. Employee demonstrates respect for others, even when addressing divergent or opposing viewpoints.</p>	
<p>Excellence: Employee actively pursues exceptional results. Employee identifies opportunities to improve the work product, faces challenges constructively, and actively seeks the best solutions. Employee serves as a mentor or role model for colleagues. Employee exercises sound judgment in business decisions.</p>	
<p>Teamwork: Employee collaborates with colleagues inside and outside the immediate workgroup, pursuing positive, cooperative relationships. Employee uses honest communication appropriately and accepts accountability for own actions. Employee actively identifies opportunities to assist colleagues and share information and expertise to help others be successful.</p>	
<p>Innovation: Employee explores new and alternative approaches to the work, appropriately anticipating risks and potential benefits, and communicating well with others who may be impacted by the alternatives. Employee demonstrates flexibility and openness to change as MERC's business priorities evolve.</p>	

<p>Overall Annual Rating:</p>
<p>Comments:</p>



Supervisor's Signature/Date:	
Second Level Supervisor's Signature/Date:	

Employee Comments:

This evaluation has been discussed with me. I understand that my signature does not necessarily indicate agreement with this evaluation. I understand that if I disagree with this evaluation, I can make it known by a written communication to my immediate supervisor, with a copy to the MERC Human Resources Manager.	
Employee's Signature/Date:	



Rating Definitions:

Successful

Employee's performance clearly demonstrates attention to, and achievement of, all assigned responsibilities. Employee properly assesses routine or normal challenges encountered in the course of work, and generally handles them well. Employee reliably provides strong, solid performance and can be depended upon to fulfill all position requirements, and may occasionally generate results above those required by the position.

Exceptional

Employee's performance is recognized across the organization for its expertise, benefiting the organization beyond the scope of the employee's own work group. Employee consistently generates unique and exceptional results of unusually high caliber, far exceeding the standards of the position. Employee's performance is truly distinguished and marks a superior contribution to the organization's objectives.

Distinctive

Employee's performance clearly and consistently generates results above those required by the position. Employee generally independently addresses usual or complex challenges encountered in the course of work. Employee's performance contributes in a superb manner to the operation and success of the work group.

Needs Development

Employee's performance does not consistently meet all the requirements of the position. Employee's performance level may reflect inexperience in the position or incomplete understanding of the responsibilities of the position. Results generated by employee are uneven, sometimes successful and sometimes not. Employee's performance requires improvement and guidance.

Unsatisfactory

Employee's performance regularly does not meet the minimum requirements of the position. Employee's performance level is less than acceptable and requires significant improvement and focused managerial direction, including structured goals and timelines for improvement.

APPENDIX 10
MBL Group Bios

DIANNE BURT-GREEN, SPHR, PRINCIPAL

PROFESSIONAL SUMMARY

An innovative Human Resources Executive with:

- ◆ Over 29 years of broad-based Human Resource experience,
- ◆ A strong sense of values,
- ◆ Solid technical skills,
- ◆ Trusted advisor.

HIGHLIGHTS OF CREDENTIALS

- ◆ Able to partner with Senior Management to contribute to overall corporate performance,
- ◆ Accomplished at developing creative and innovative programs to benefit the company, its employees and shareholders,
- ◆ Broad-range background in support of service, manufacturing and high-tech environments in both public and private organizations,
- ◆ Skillful at building employee trust and ownership,
- ◆ Experience with the Human Resource elements of mergers and acquisitions, and
- ◆ Efficient at building Human Resources from staff function to fully independent department.

PROFESSIONAL BACKGROUND

Mentor Graphics Corporation, Wilsonville, Oregon
Human Resources Business Partner – Compensation

The Chas. H. Lilly Company (Lilly/Miller), Portland, Oregon
Vice President Human Resources

Boyd Coffee Company, Portland, Oregon
Human Resources Manager

Boise Cascade Corporation, Portland, Oregon
Compensation/College Relations/EEO Manager; Human Resources Coordinator

Holladay Park Hospital, Portland, Oregon
Personnel Administrator

PROFESSIONAL ASSOCIATIONS

Portland Human Resource Management Association (PHRMA), Society for Human Resource Management (SHRM), WorldatWork (formerly American Compensation Association-ACA), Columbia Willamette Compensation Group (CWCG).

EDUCATION

Bachelor of Arts, Humanities, Marylhurst College

ALISYN PETERS, SPHR, Senior Associate

PROFESSIONAL SUMMARY

Experienced Human Resources Professional with:

- ◆ Strong technical skills,
- ◆ High level of ethical standards,
- ◆ Commitment to professional results.

HIGHLIGHTS OF CREDENTIALS

- ◆ Over 15 years of broad-based Human Resources experience,
- ◆ Knowledgeable in supporting and managing various functions of Human Resources from within a small not-for-profit organization to a large corporation,
- ◆ Demonstrated ability to partner with management in the development and implementation of business strategic plans,
- ◆ Able to develop and implement recruitment strategies for organizational expansion and development,
- ◆ Experience and skill in training and developing diverse management teams.

PROFESSIONAL BACKGROUND

Comcast Cable, Inc., Portland, Oregon
Human Resources Generalist

Cedar Sinai Park, Portland, Oregon
Human Resources Director

Robison Health Center of Cedar Sinai Park, Portland, Oregon
Personnel Coordinator

PROFESSIONAL ASSOCIATIONS

Portland Human Resource Management Association (PHRMA)
Society for Human Resource Management (SHRM)

EDUCATION

BA Human Resources Management, George Fox University

COURTNEY BUSH, ASSOCIATE

PROFESSIONAL SUMMARY

A confident Human Resources Professional with:

- ◆ Strong technical skills,
- ◆ An excitement to learn and improve skills,
- ◆ Commitment to building strong relationships and professional results.

HIGHLIGHTS OF CREDENTIALS

- ◆ Experience in all aspects of total compensation projects,
- ◆ Experience conducting research and compiling results for organization review.

PROFESSIONAL BACKGROUND

MBL Group, LLC, Portland, Oregon

Human Resources Associate

Ameriquest, Orange, CA

Compensation Coordinator

EDUCATION

Bachelor of Arts, Business Administration/Human Resource Management

Eastern Washington University – June 2004

Summa Cum Laude

Verizon District VIII Academic All-Region 2003,2004

MADDY MAHONEY, PHR, ASSOCIATE

PROFESSIONAL SUMMARY

A conscientious Human Resources Professional with:

- ◆ An analytical and self-motivated individual.
- ◆ An acute awareness of managing confidential and sensitive issues, and
- ◆ A task oriented focus.

HIGHLIGHTS OF CREDENTIALS

- ◆ Experience conducting research and compiling results for organization review.
- ◆ Ability to advise an organization's leadership team on developing new processes and procedures.
- ◆ Capacity to work in a group setting without losing sight of the strategic goals of the organization.

PROFESSIONAL BACKGROUND

MBL Group, LLC, Portland, Oregon

Human Resources Associate

Wells Fargo & Company, Portland, Oregon

Fraud Prevention Specialist

Wells Fargo & Company, Portland, Oregon

Customer Service Representative

PROFESSIONAL ASSOCIATIONS

Portland Human Resource Management Association (PHRMA)

Society for Human Resource Management (SHRM)

EDUCATION

Bachelor of Science, Human Resource Management, Portland State University

Associate of Arts, Liberal Arts, Broward Community College