

## Minimum Qualification Principles

*Last Updated on 8/26/19*

This reference tool provides guidance for setting experience and education minimum qualifications for classifications based on field and level. While these are the default guidelines, they are rebuttable based upon a reasonable showing of a need for a variance.

Minimum qualifications reflect the lowest level of acceptable education and/or experience required of an individual such that the individual reasonably could be expected to satisfactorily perform the duties of the position. The guidelines will assist departments to develop minimum qualifications that are reflective of what is required upon entry in order to be successful in a position, yet not so high as to create artificial barriers or impede promotive opportunities.

This tool will provide consistency in decision making across the City when assigning minimum qualifications. The minimum qualification guidelines will provide benchmarks for managers when determining their needs for a particular position. The minimum qualification principles have been developed to assist departments when developing job analysis questionnaires, recruitment and selection devices and submitting requests for changes to class specifications.

CSC Rule 110.9.1 - Every applicant for an examination must possess and maintain the qualifications required by law and by the examination announcement for the examination.

### APPOINTMENTS VERSUS ASSIGNMENTS

- Appointments: Regardless of the appointment type (e.g., Permanent Civil Service (PCS), Permanent Exempt (PEX) or Temporary Exempt (TEX)), all employees must meet the MQs noted on the classification specification.
- Out of Class Assignments: As out of class assignments are not appointments, employees technically need not meet the MQs for the classification to which they are assigned work. Nonetheless, DHR recommends as a best practice that employees meet the MQs noted on the classification.

### OCCUPATIONAL CATEGORIES

#### Occupational Category Definitions:

- Clerical: Perform routine office tasks supporting the general function of the office or managerial positions. Occupations in which workers are responsible primarily for internal and external communication, recording and retrieval of data and/or information and other paperwork required in an office.
- Maintenance: Perform duties which result in or contribute to the comfort, convenience, hygiene or safety of the general public or which contribute to the upkeep or care of public buildings, facilities or grounds.
- Crafts/Trade: Trades are externally defined and have regulatory codes.
- Technical: Occupations which require a combination of basic scientific or technical knowledge and manual skill which can be obtained through specialized, post-secondary school education or through equivalent on-the-job training (e.g., computer programmers, drafters, survey and mapping technicians, licensed practical nurses, technicians (medical, dental, electronic, physical sciences)).

- **Professional:** Perform duties that require interpretation, independence of judgment and application of defined principles, practices and regulations. Requires a bachelor or advanced degree and may require certification or licensing.
- **Management:** High administrative and policy influencing with responsibilities for managing a major function or rendering management advice to top-level management authority. Performs duties focused on planning, organizing, directing and controlling resources and program delivery.

**Level Definitions:**

- **Entry / Trainee:** Trainee or routine level; typically those with little or no training or experience in the job area; operate with significant oversight.
- **Journey:** Perform the full range of duties; operate with supervision typically only upon completion of tasks; generally requires knowledge or experience in the job related area as a minimum qualification.
- **Advanced Journey / Senior:** Perform specialized duties in a highly independent manner that require modifying approaches, methods or techniques; may supervise lower level positions.
- **Principal:** Lead responsibilities in instructing and training staff; generally should supervise lower level positions.

<b>CLERICAL / MAINTENANCE / TECHNICAL</b>		
<b>Level</b>	<b>Training and Experience</b>	<b>Substitution</b>
<b>Entry / Trainee</b>	6 months – 1 year of general experience.	6 months of education (15 semester units) or technical training exp. may be substituted for 6 months of experience
<b>Journey</b>	2 years of general experience <b>OR</b> 1 year of requisite/specialized experience to the classification	6 months (15 semester units) of specialized coursework may be substituted for 6 months of experience
<b>Advanced Journey / Senior</b> <i>“may supervise”</i>	3 years of general experience <b>OR</b> 2 year of requisite/specialized experience to the classification	1 year (30 semester units) of specialized coursework may be substituted for 1 year of experience.
<b>Principal</b> <i>“must supervise”</i>	4 years of general experience <b>OR</b> 3 year of requisite/specialized experience with 1-2 years of supervisory experience as a desirable	2 years (60 semester units) of specialized coursework may be substituted for 2 year of non-supervisory experience

<b>CRAFTS (with apprenticeship)</b>		
<b>Level</b>	<b>Training and Experience</b>	<b>Substitution</b>
<b>Apprentice</b>	Varies by union	None
<b>Journey</b>	Apprenticeship program <b>AND</b> 1 - 3 years journey level experience	5 years of experience in the field; if the apprenticeship program is administered by the City, no experience should be required
<b>Supervisory 1</b>	Apprenticeship program <b>AND</b> 3 - 5	6 - 7 years of journey level

	years journey level experience	experience
<b>Supervisory 2</b>	Apprenticeship program <b>AND</b> 4 - 6 years journey level experience <b>AND</b> 1 - 2 years supervisory	7 years of journey level experience <b>AND</b> 2 years of supervisory experience

<b>CRAFTS (without apprenticeship)</b>		
<b>Level</b>	<b>Training and Experience</b>	<b>Substitution</b>
<b>Journey</b>	1 - 2 years of experience in the field	None
<b>Supervisory 1</b>	2 - 4 years of experience in the field	None
<b>Supervisory 2</b>	3 - 6 years of experience in the field <b>AND</b> 1 - 2 year supervisory	None

<b>PROFESSIONAL</b>		
<b>Level</b>	<b>Training and Experience</b>	<b>Substitution</b>
<b>Entry</b>	Baccalaureate Degree	1 year of experience may substitute for 1 year of education up to 4 year degree
<b>Journey</b>	Baccalaureate Degree <b>AND</b> 1 - 2 years of experience	1 year of additional experience may substitute for 1 year of education up to a max of 2 years
<b>Advanced Journey / Senior "may supervise"</b>	Baccalaureate Degree <b>AND</b> 3 - 4 years of experience	1 year of additional experience may substitute for 1 year of education up to a max of 2 years
<b>Principal "must supervise"</b>	Baccalaureate Degree <b>AND</b> 5 - 6 years of experience with 2 years of supervisory experience as a desirable	1 year of additional experience may substitute for 1 year of education up to a max of 2 years

**GENERAL GUIDELINES**

**1. Minimum Qualifications for a Job Family or Class Series:** Ideally, there should be not additional minimum qualifications added to classes higher in the same series that are not required at entry other than more years of experience. Doing otherwise would prevent promotion from within.

**2. Supervisory Experience Guidelines:**

- If underlying class supervises, higher classes must require supervisory experience.
- If underlying class 'may' supervise, supervisory experience in the higher level should only be listed as a desirable qualification to ensure not creating barriers to advancement.
- Supervisory classifications require:
  - minimum of 3 years of journey level experience; and
  - years of experience required should be an additional 2 years of experience above that required for the journey level

### 3. Department Specific Classifications or Special Conditions:

- Requests for department specific classifications are not appropriate if any necessary training can be obtained on the job within 6 months and/or the duties are not at least 25% unique from equivalent citywide classifications.
- Requests for special conditions are not appropriate if the knowledge/skill can be learned on the job within 2 months. Example of an approved special condition: 1823 / 1824 – Legislative & Policy Analysis - Recent verifiable experience in analysis and implementation of policy or legislation which modifies the framework of an organization or agency, to change the way an organization operates, and/or developing a body of regulations or drafting legislation. (Not all positions within a classification will have a special condition or will have the same special condition)

### 4. Education:

- High School/GED: For non-technical, non-professional jobs; require for jobs that need basic literacy and numeracy skills.
- College-Level Coursework: For when specific skills sets are needed (e.g., higher level writing or arithmetic).
- Associate's Degree: For when college level reading, writing and arithmetic is needed in particular technical area.
- Bachelor's Degree: For professional level. Identify specific degrees only in situations where specialized knowledge is necessary (e.g., chemistry) and do not use "or closely related".
- Master's Degree: For specialized occupational areas.
- Professional Degree: For those occupations typically requiring licensure or certification (e.g., attorney; doctor).

**5. Education Substitution:** There are instances in which some or all of the required education can be substituted out with on-the-job experience. However, for positions in which it is not only critical to know how to perform the specific tasks, but to also have an understanding of the underlying theories and principles behind those tasks, such work experience may not be able to supplant the education.

- Full: There are journey level classifications that require a bachelor's degree or substitution of years of experience for years of education on a 1:1 ration. Due to the nature of certain industries, comparable experience can be gained through obtaining a bachelor's degree or working in the field. (e.g., 1052 IS Business Analyst recommends a Bachelor's Degree and 1 year of experience, but the minimum qualifications will allow for full substitution of additional years of experience in the information systems field for the degree requirement.) It is also permissible in positions in which the applicant pool is from the trades or public safety where higher level degrees are not prevalent in order to ensure an adequate size applicant pool.
- Partial: Many journey level positions allow limited substitution of additional years of experience for education for a maximum of 2 years. These classifications require 2 years of education to develop the

analytical and writing skills necessary to perform the duties and responsibilities of the position (e.g., 1842 Management Assistant may substitute up to 2 years of required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration.)

- None: There are instances when educational requirements for certain classifications cannot be substituted with experience. These classes require an advanced level of education in their specialized field in order to be successful. Examples of classifications that require a baccalaureate degree in a specific field include Architects, Engineers, Chemists and Librarians.

**6. Licenses/Certificates:** When a license/certificate is required that has experience and education requirements necessary in order to achieve the license/certificate that are equivalent to or exceed the experience and education requirements of the City, just list the license/certificate in the minimum qualifications to avoid confusion about what are the education and experience requirements. In these instances, the candidate should rely upon the governing agency for direction.

**7. Decision Making – Scope of Independence**

Decision Making – Scope of Independence	
Level	Level of Supervision
Entry	<u>Under immediate supervision</u> – Work is performed in accordance with established guidelines or procedures. Few deviations from established practices are made without checking with the supervisor
Journey	<u>Under general supervision</u> – Exercises some judgment in selecting appropriate established guidelines to follow. Significant deviations require prior approval. Interpretation of general administrative or operational policies is sometimes necessary.
Advance Journey / Senior	<u>Under direction</u> – Frequently interprets policies, procedures and guidelines. Work may require the development of recommendations consistent with directives, policies, and regulations.
Principal	<u>Under general direction</u> – Exercises creativity and resourcefulness to accomplish goals and objectives.

**RESOURCE TOOLS**

**1. Minimum Qualifications Conversion Table:**

Education	Experience
30 semester / 45 quarter units	1 year of experience
AA Degree	2 years of experience
BA/BS Degree	4 years of experience

Note:

Classifications requiring a Baccalaureate Degree and a minimum of 2 years work experience may include substitution language as follows if appropriate for the classification: possession of a Master’s Degree in a related field or Law degree may be substituted for one year of work experience. Experience requirement cannot be fully substituted with education. For example, requiring a Bachelor’s degree and 1 year of experience and allowing the substitution of the Master’s Degree or Law degree for the one year of work experience. If higher level education

is being used to swap out specific work experience, then the qualifying higher level education must conform in scope to the specific work experience to be swapped out.

## 2. Standardized Language Table:

<b>Degree</b>	<b>Language</b>
Driver's License	Possession of a valid California driver's license
High School	High school diploma or equivalent (GED or High School Proficiency Examination)
Associate Degree	Requires an associate degree from an accredited college or university
Bachelor Degree	Requires a baccalaureate degree from an accredited college or university
Degree Substitution	Additional experience as described above may be substituted for the required degree on a year-for-year basis (up to a maximum of x years). Thirty (30) semester units or forty-five (45) quarter units equal one year.